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Leadership from the file room to the board room

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Leadership from the File Room to the Board Room: A Grounded Theory Inquiry into the Influences of a Leadership Development Program on Participants

Proefschrift

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Abstract

In this qualitative study, I explored the influences of an 18-month long leadership development program offered within a large, public service organization on the professional and personal lives of graduates. Researching from a social constructionist stance, I chose to use situational analysis, a variation of grounded theory methodology, to frame the study. I collected the first round of data using a matrix interviewing methodology during which research participants interviewed each other about the influences that the program had on them, and then the participants conducted the initial analysis of the data. The second round of data was collected through one-on-one interviews, and I analyzed the data using situational analysis maps and mind maps. The resultant theorizing indicated that although the influences of the program vary widely, the Leadership Development Program created a safe space in which participants engaged in conversations that stretched and challenged their thinking and feeling about themselves, their relationships, and their performance of leadership. Research participants reported that they show up in life and at work differently as a result of the program experience, and that they have new language with which to talk about leadership in their personal and professional lives.

Acknowledgements

My Mom and Dad always encouraged me to be curious and to try in my own way to make the world a better place. My sister Jan has always made me feel smart and capable of anything. To the three Dawsons, I am forever grateful.

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Caitlin McClure was my improvising, playful, ready to celebrate miniscule accomplishments writing coach, without whose energy I would have crumbled. Wow. Brayden McCue created the stunning piece of sculpture for the cover in response to my explanation of relational leadership. A true artist.

This dissertation has been on the receiving end of Shanaya Nelson's keen eye for detail. As editor, Shanaya fixed, tweaked, and gently nudged me towards a clean copy. Without her, the journey would have been less.

Bob McCue and I fell in love 2 years into this project. Bob asked me about the research, about my thought processes, about what I was learning—his questions were not easy to answer. Bob taught me what it means to think clearly and carefully about things that matter to me. His love and encouragement have been constant.

I want to acknowledge my remarkable kids, John and Abby. They have watched me tackle two graduate degrees and I am not sure they understand what it is I study, or why. They just want me to be happy, doing things that I love. I trust that I will always remember to return the favour. This dissertation is for them, even though they likely won't read it. That is as it should be—they have their own work and play ahead.

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Prologue

Good writing is suggestive and pungent, it evokes feelings—relief, recognition, drama, disdain, horror—and bodily responses—the flush of recognition and the sharp intake of breath, the tingle as we feel that this might be showing us something we hadn’t thought or experienced before. Good writing is often unpredictable—shocking in its terseness or economy, audacious in its sudden sweep or the intimacy of a confidence. (Grey & Sinclair, 2006, p. 452)

I have an interest in theatre, so I want to set the stage. I wanted this dissertation to evoke the responses described by Grey and Sinclair (2006) and acknowledge that it may not. I played two roles simultaneously as this research project unfolded. I was studying as a fledgling academic and I was working as a leadership development practitioner within organizations. I wanted this writing to be compelling and rigorously academic, without being off-putting. I wanted readers to feel welcome and intrigued while exploring the intersection of academe and leadership development practice.

Many academics have studied issues important to organizational leaders (Day, 2000; Jackson & Parry, 2008; Storey, 2004); however, according to Hinkin, Holtom, and Klag (2007), the research results are rarely communicated effectively and there seems to be a disconnect between the scholars, practitioners, and organizational members. “Though numerous calls for more academic/practitioner collaboration have been made, there has been relatively little progress in achieving it” (Hinkin et al., 2007, p. 105). I wanted to design and participate in productive research while doing work I love in support of participants and their organizations. I wanted to apply what I learned in practice and deepen my understanding of what makes a difference to the organizations in which I work, so as a “pracademic” (thanks to Dr. Dan Wulff for the new word), I began writing this dissertation at the intersection of those two roles— practitioner and researcher.

This piece of writing has two primary objectives. One goal is to explain my findings and to answer the research question: What influence has the Government of Alberta Leadership Development Program had on participants, professionally and personally? The second goal, which is just as important as the first, is to tell the research story in a compelling manner and explain how I conducted the research, what I learned along the way, and how it integrated with and informed my day-to-day practice.

Chapter One: Context

Before the Beginning

Most leadership scholars are drawn to the field by a desire to make the world a better place. These people, and I am no exception, “tend to be the token dreamers, the chronic optimists and the hopeless romantics” (Jackson & Parry, 2008, p. 7) with a profound curiosity about leadership processes. It was my desire to make the world a better place that led me to graduate school to study leadership 10 years ago; at that time I was confused about what leadership meant. I was not alone in my confusion. As Harter (2008) wrote, “Scholars vigorously debate the very meaning of the term, and it is commonplace that leadership is a protean construct, ever shifting and re-forming itself in response to shifting times, contexts, participants, and purposes” (p. ix). Harter referred to leadership studies as a veritable wilderness of “overlapping and often conflicting investigations, analyses, and accounts” (p. ix). My wander into the wilderness began 10 years ago.

During the first residency of my Masters in Leadership program at Royal Roads University, a fellow student shared that his biggest challenge in his own leadership performance was that he analyzed situations to death, scripted and preplanned in his head, worried about everything he was going to say before saying it, and then it would never come out right (Classmate, personal communication, July 15, 2000). Having been a theatre teacher I, rather flippantly, whispered back, “You need a grade nine improvisation lesson.”

I intuitively thought at the time that, in order to increase the likelihood of participating in this phenomenon called leadership, one needed the basic skills of an improviser. In that moment, however, improvisation and leadership did not seem to have much in common. I had bought into the idea that leadership was very serious business, as was graduate school, and that improvisation was far too playful to be of value in this environment. Rob Poynton (2008), in his work, *Everything's An Offer*, pointed out that to play with improvisational principles,

You have to be willing to be a novice, venture into the unknown, make mistakes and sound stupid . . . and this is a particular stretch for anyone whose identity is invested in sounding smart, which includes most people who do well in business. (p. 242)

Learning about and playing with improvisation principles seemed like a natural response to my classmate's concerns about the awkwardness he experienced due to his preplanning before speaking up (Classmate, personal communication, July 15, 2000). I whispered my suggestion about an improvisation session with no intention of it going any further.

That whispered response launched me on an adventure that continues to engage and surprise me. What unfolded was a learner-led seminar during which my classmates and I explored basic improvisation and theatre exercises and their application to our leadership studies. We played and explored the connections we saw between simple improvisational theatre principles and the supposedly complex (and what I saw as serious) business of leadership. Our discoveries led us to agree with Isaacs's (1999) suggestion that the best conditions for learning and leadership "included settings in which people listen well to each other, respect differences, and can loosen the grip of certainty they might carry to see things from new perspectives" (p. 12). These very same behaviours form the foundation for improvisation. Effective improvisation, like effective leadership, happens in relationship among two or more people, and it requires a surrendering of control. As Stephen Nachmanovitch (1990) wrote in *Free Play*,

To the extent that we feel sure of what will happen, we lock in the future and insulate ourselves against those essential surprises. Surrender means cultivating a comfortable attitude toward not-knowing, being nurtured by the mystery of moments that are dependably surprising, ever fresh. (p. 21)

The improvisation session with my classmates was a 90-minute experience that I dismissed as a fun afternoon with colleagues and nothing more, yet there was residual excitement that stayed with me. I was intrigued by the intersection of improvisation and this phenomenon called leadership.

Playing with the Relationship between Improvisation and Leadership

Reflecting on that improvisation experience after graduation from the Master's program, I realized that when I registered for the program I had, quite deliberately, ignored and then repressed my perceived-as-ordinary professional background as an improviser and theatre educator. I was embarrassed by my background as an actor and classroom drama teacher in this university cohort of business leaders and "corporate folk."

I set out, through the graduate program, to transform myself into a hotshot businesswoman with fancy letters behind my name, capable of changing organizations for the better while impressing people with my new knowledge. I did not want my public sector past—working with teenagers in a high school drama studio—to get in the way of stepping onto the corporate stage, which was, in my mind, the “real world.” I was determined to prevent a collision between these two distinct aspects of my life.

At the time I failed to appreciate that the practices and sense of community that we build as improvisers, theatre artists, and teachers are the same conditions that support people within organizations to collaborate, innovate, and create organizational cultures that are healthy and productive. As Margaret Wheatley (2005) suggested in *Finding Our Way: Leadership for an Uncertain Time*,

We can't be creative if we refuse to be confused. Change always starts with confusion; cherished interpretations must dissolve to make way for the new. Of course, it's scary to give up what we know, but the abyss is where newness lives. When we're bold enough to we move through the fear and enter the abyss, we rediscover we're creative. (p. 213)

My accidental response to my classmate's (personal communication, July 15, 2000) disclosure that he struggled with being fully present when speaking publicly, along with our cohort's willingness to experiment with theatre games, allowed me (eventually) to acknowledge the value of looking at leadership through an improvisational lens.

Since then I have had opportunities to collaborate with several organizations as they work towards building their leadership capacity. No matter what the initial challenge or opportunity presented by my clients, it seems that most organizational leaders acknowledge Isaacs's (1999) belief that “the problems that even the most practical organizations have—in improving their performance and obtaining the results they desire—can be traced directly to their inability to think and talk together, particularly at critical moments” (p. 3). Thinking and talking together at critical moments in order to create something striking for an audience is what good improvisation is all about. Thinking and talking together in order to create something new is also what good conversation and leadership is all about, from my perspective. The significance of the relationship among leadership and improvisation and transformational conversations grew stronger for me with every client engagement over the past 10 years.

It is within conversation that change can occur. In *Fierce Conversations*, Susan Scott (2004) reminded us, “Conversations are the work of a leader and the workhorses of an organization. While no single conversation is guaranteed to change the trajectory of a career, a company, a relationship or a life—any single conversation can” (p. xix).

In my experience, when organizational leaders say, “We need more leadership around here,” they are often asking for different kinds of conversations than the ones currently unfolding. Susan Scott (2004) proposed, “Our very lives succeed or fail gradually, then suddenly, *one conversation at a time*” (p. 1). Encouraging open conversation and dialogue have become the central focus of my work. To paraphrase Taos Institute faculty member, Dr. Sheila McNamee, I have become somewhat of a one-trick pony when approached about developing leadership. My immediate response is, “Are you open to talking about the conversations that you are having, the ones that you are avoiding, and how that is working out?”

Peter Senge commented in his forward to Isaacs’s (1999) *Dialogue and the Art of Thinking Together* that we must begin to, “see conversation as a kind of ‘aperture’ through which social realities unfold . . . [and that] our conversations organize the processes and structures which shape our collective futures” (p. xix). My clients often ask: If conversation is so important how do we learn to have them better? My response echoes Isaacs’s assertion “that the most important parts of any conversation are those that neither party could have imagined before starting” (p. 9). Letting go of control and our need to be smart and right, and allowing new possibilities to emerge in conversation seem important in creating the conditions for leadership and positive change to emerge. The basic principles of improvisation and theatre as applied to leadership conversations, first explored during my Master’s studies, continued to surface as integral to my day-to-day work within organizations.

Without intentionally setting out to weave improvisational elements into my work, I have consistently integrated those basic principles into my practice. As Nachmanovitch (1990) pointed out, we already know that everyday speech, when entered into with openness to change, is a case of improvisation.

More than that, it’s a case of shared improvisation. You meet someone new and you create language together. There is a commerce of feeling and information back and forth, exquisitely coordinated. When conversation works, it is, again, not a matter of meeting halfway. It is a

matter of developing something new to both of us. (Nachmanovitch, 1990, p. 95)

My two worlds had indeed collided, and the collision led me to experiment with the design and delivery of leadership development programs.

In 2006, I wondered what real difference these programs were making. I received positive feedback from participants and their organizational sponsors, most typically in formal evaluations at the end of each session or program. I had been practicing and applying my ideas, but I was not taking the time to collect and analyze the results systematically in order to understand what was happening for participants over the long term. I began my search for a doctoral program that would allow me to research what was different in the lives of participants after completing a leadership development program.

I Wanted to Reflect on my Practice

The welcome message on the Taos Institute's (n.d.b) homepage includes this statement:

The Taos Institute is a community of scholars and practitioners concerned with the social processes essential for the construction of reason, knowledge, and human value.

We are a non-profit (501 c3) organization committed to exploring, developing and disseminating ideas and practices that promote creative, appreciative and collaborative processes in families, communities and organizations around the world. (para. 2–3)

I found the Taos Institute's (n.d.b) website in January 2006 through the recommendation of a colleague. I was intrigued by ideas I discovered on the website, especially the suggestion that language is a relational, generative, creative, social process through which we create knowledge and our reality. As I read the manuscripts and publications featured by the founders of the Taos Institute, I noticed a connection to my work and my passion for improvisational principles.

The publications available on the Taos Institute's (n.d.a) *Noteworthy Dissertations* page aligned with my interest in making the world a better place through social processes and transformative conversations. The featured research projects and theories were fresh and interesting. Promoting creative, appreciative and collaborative processes in the real world also made practical sense to me. I registered for the Taos Institute's introductory workshop with two of the founders, Ken and Mary Gergen.

During that introductory workshop, I heard the terms social constructionism, relational inquiry, and phrases like “individuals are constituted by their relations” for the first time. I was intimidated by the unfamiliarity of the language but quickly felt more comfortable after explanations, such as: “We construct the world” (Gergen & Gergen, 2004, p. 8); “it is through relationships that rationality is created, goals become important, and one feels worthy or not” (Anderson et al., 2006, p. 10); and “*nothing* is real unless people agree that it is” (Gergen & Gergen, 2004, p. 10). What became clearer to me was that a social constructionist stance invites people to consider how the language we use, the way we show up in conversations, and the way we engage in relationships, all have a profound influence on what is possible in moving forward. I started seeing stronger connections among my interests in improvisation, leadership development, and this new (to me) perspective called social constructionism. Nachmanovitch (1990) described the way improvisers play with each other in creating something new:

I play with my partner; we listen to each other; we mirror each other; we connect with what we hear. He doesn't know where I'm going, I don't know where he's going, yet we anticipate, sense, lead, and follow each other. There is no agreed-on structure or measure, but once we have played for five seconds there is a structure, because we've started something . . . what comes is a revelation to both of us. (p. 94)

As I listened to Ken and Mary Gergen explain their perspectives, I realized that I had been teaching, facilitating, and parenting from a social constructionist stance without having the language to name it.

I wanted to conduct the research with participants with whom I could co-create possibilities for positive change within an organization that would value the opportunity to participate and learn from the experience. As Hinkin et al. (2007) discovered in their study about collaborative research relationships among academics and organizations, the critical ingredients for an exemplary initiative include goal congruency, mutual respect, time, and trust. Hinkin et al. found that “a relationship of trust between the researcher and the organization is critical to success . . . and researchers need to establish their credibility in part by showing an in-depth understanding of the dynamics being explored” (p. 107). The program and organization that met the criteria above turned out to be right at my fingertips.

I was, and still am, closely involved with the design and delivery of a leadership development program sponsored by the Government of Alberta in

Canada, and the program administrators were eager to explore and analyze the differences that the program was making to its participants. Several graduates from the program, from as far back as 2002, were also eager to reconnect with each other and continue their own leadership development. Here was the “research sweet spot” I had been looking for—the people responsible for operating a program were keen to learn more about what difference the program was making to participants after graduation, and the participants themselves were interested in talking about what influences the program had within their professional and personal lives. Both stakeholder groups were open to strengthening their relationships and connections with one another.

When I suggested that my proposed research might invite data that would help us better understand the influences of the program and provide opportunities for program graduates to reconnect, the administrators of the program expressed interest. After ensuring government regulations and guidelines around privacy, confidentiality, and freedom of information would be met by my research design, they invited me to proceed.

The Background Story of this Leadership Development Program

In order to situate this research and offer context, in this section I describe the unfolding history and an overview of the Leadership Development Program that became the focus of this study. The program’s story continues to this day.

The 18-month long, part-time leadership development program had humble beginnings within one ministry of the provincial Government of Alberta, Canada. In 1999, a new ministry had been formed when three departments were joined together with the intent of improving the ability to provide career and employment skills development, income support, and workplace support to the citizens of Alberta who required assistance from their government. The Deputy Minister of the new Alberta Human Resources and Employment (AHRE) Ministry, Ron Hicks, voiced a strong commitment to leading through the growing pains of forging a shared identity between the various cultures that existed within this newly formed ministry and increasing leadership capacity (K. Freier, personal communication, December 5, 2008). Through conversations with Ron Hicks over several meetings, I think that he was also committed to strengthening his employees for the good of their families, their communities, and their society. In a personal email exchange between now retired Ron Hicks and me, I asked him what he would most like

to learn from this dissertation research. An excerpt from his emailed response is, with his permission, reprinted here:

I am curious about how much of an impact participation in the program has had on the participants' home life and their contribution in their community—are they a better dad or mom or better spouse as a result? Are they able to make a bigger contribution to their community's sports programs, the United Way or to their church? From the beginning I saw this as a potential benefit to our Alberta society but I don't know if there is any evidence of it. (R. Hicks, personal communication, September 14, 2008)

At the request of Deputy Minister Ron Hicks, AHRE's Executive Team prompted the assembly of a Leadership Committee, composed of representatives from all divisions within AHRE. A vital component leading to the design of the Leadership Development Program was the involvement of Colleen Crickmore, a staff member called to join the deliberations while on education leave studying leadership. The timing worked well to ask Colleen what a leadership development program within AHRE might look like, and Colleen agreed to research best practices and champion the development of a program in conjunction with her Master's thesis. An academic mentor to Colleen Crickmore, Dr. Fred Jacques, was invited to join the AHRE Leadership Committee to nurture the emerging leadership development model that was soon to blossom into the program under study. February 2, 2001, was a pivotal date when the committee gathered to present a detailed action plan to launch the Leadership Development Program within AHRE.

A briefing note described the vision for a program that would develop leadership capacity not only for positional leadership candidates, but also to open an avenue for any staff member at any level of the organization to access the program. Until this point within the Alberta Public Service, leadership development opportunities were available only to people in formal positions of authority: supervisors, managers, and senior leaders serving at the executive level. This novel approach was suggested to address not only the challenges of continuity planning in the face of the aging workforce and emerging recruitment challenges, but also to increase the possibility of developing leadership at all levels. The key to success, according to the newly formed Leadership Committee, involved a long-term strategy that offered all staff at all levels of the government hierarchy a practical, experientially-based program grounded in a belief that leadership happens at all levels within an organization. The AHRE Executive Team agreed to support the concept with

their personal involvement and a financial commitment of \$1 million. The new program, with deliberate intention, was called *Leadership – From the File Room to the Board Room* (Government of Alberta Employment, Immigration, and Industry, 2008).

The AHRE Executive Team met on June 12, 2001, for a day of dialogue about the context of the leadership program, the philosophy behind the program design and framework, and the critical role that the Executive Team and Senior Managers would play in supporting the initiative. Dr. Fred Jacques, soon to also become a facilitator in the Leadership Program, facilitated the day. A memorandum was subsequently sent out from Ron Hicks to all staff announcing the program intended to increase the leadership capabilities of department employees and encouraging staff members to explore this new opportunity (K. Freier, personal communication, September 14, 2008).

The inaugural group of 36 participants commenced the program September 2001 with a second group joining in January 2002. The hope to build leadership capacity had matured from an idea to a reality within the brief time span of one year.

The 18-month-long program is philosophically based on Jim Kouzes and Barry Posner's (2007) research described in their repeatedly published book *The Leadership Challenge*. Kouzes and Posner discovered five exemplary leadership practices that emerged from their interviews of thousands of people from various walks of life who helped create positive change: model the way, challenge the process, enable others to act, inspire a shared vision, and encourage the heart. In Kouzes and Posner's (2007) often quoted words, "leadership is everyone's business" (p. 1), and that statement grounded this Leadership Development Program.

The program's guiding principles, based on Colleen Crickmore's (2002) research include: every individual has the capacity to develop leadership skills, leadership can be practiced and is needed at all levels, participation in the program is an individual choice, the program is experientially based because leadership is learned by doing, and executive management actively supports and participates in the program.

Participants must make a formal application to join the leadership program, including a statement around their purpose and intention for applying. They must have the support and signature of their direct supervisor in order to be considered a potential candidate.

The program offers a combination of learning techniques, and facilitated dialogue among participants is invited both online and in person to increase knowledge and skills. There are face-to-face learning opportunities through seminars and clinics, along with video and teleconferences that can be conducted at a distance. Throughout the program, teams of approximately six people plus an assigned mentor meet regularly to discuss common issues and support each other in achieving their personal leadership action plans. Assessment and feedback on current leadership skills and behaviours is provided through formal assessment tools and in conversation over the entire 18 months. Involvement of senior positional leaders throughout the participating ministries has been an important aspect of the program as they volunteer to serve as mentors to offer active support by encouragement, sharing their experiences, and coaching.

Figure 1 provides a visual representation of the program design referred to by the program administrators as a Program Map. Figure 2 provides a more specific description of the various elements and more information about the administration of the program. The total formal in-class time spent over the course of 18 months is 9 days including the graduation celebration. Detailed information on the program is accessible to all Government of Alberta employees on the Alberta Employment and Immigration intranet site (<http://eii-intranet.gov.ab.ca/>).

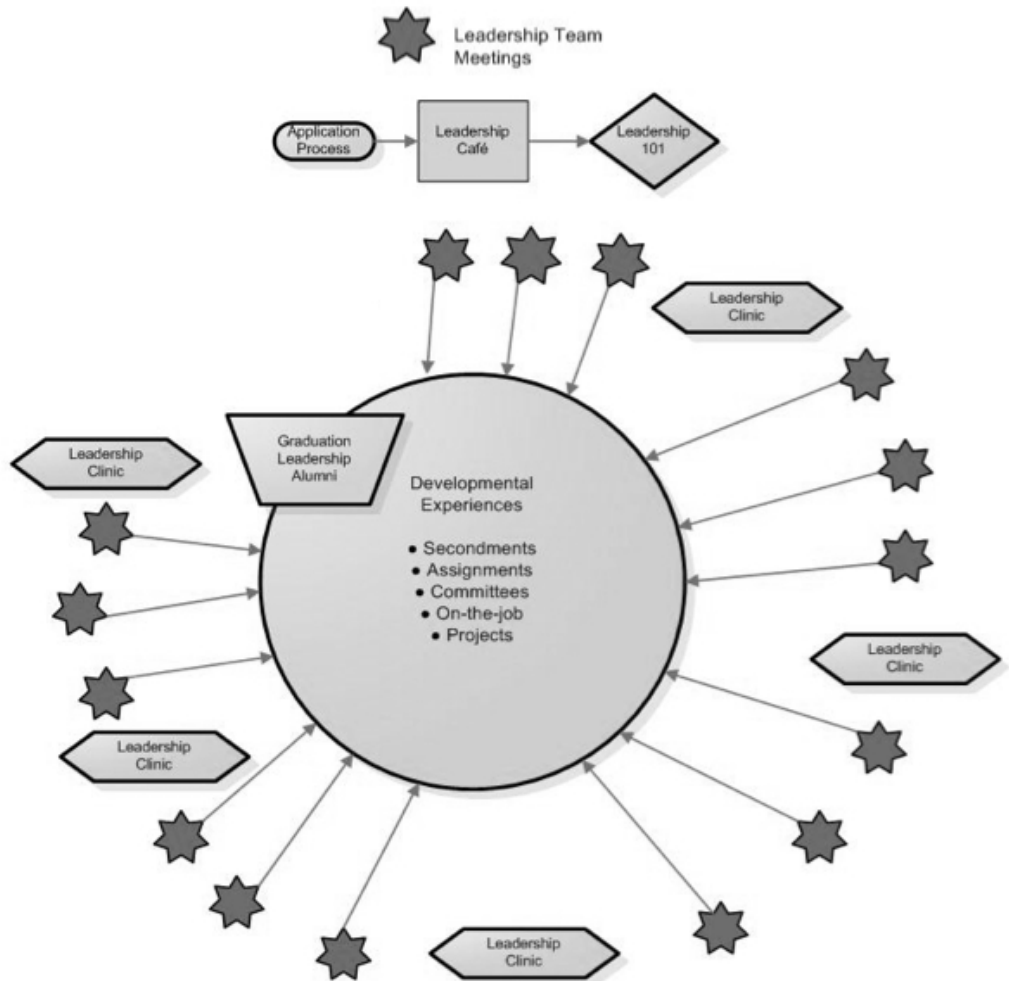


Figure 1. The Leadership Development Program map, which provides an overview of the 18-month program. Each step is linked to and leads to the next step.

Application Process: email notice/forms on intranet – two intakes per year http://ei-intranet.gov.ab.ca/departments/cs/leadership	
Leadership Cafe: on-line discussion group 10 weeks	
Leadership 101: A 3-day classroom seminar delivered in Edmonton and Calgary	
Leadership Teams: 2 x monthly Continue to meet for remainder of program Leadership Clinics: approx. every 2 months <ul style="list-style-type: none"> • Leader as Coach • Appreciative Inquiry • Leading Through Conflict • Influencing Without Authority • Leading Change 	Developmental Opportunities: Opportunities to develop leadership practices through activities such as: <ul style="list-style-type: none"> • On-the-job enhancement • Developmental Assignments • Special Projects • Committee Involvement • Secondments
Graduation: pictures, program, dinner and ceremony with guest speakers, Deputy Ministers & mentors invited	
Leadership Network: Program graduates create their own self-organized alumni groups	
Advanced Leadership Series: (2010) available to graduates and mentors <ul style="list-style-type: none"> • Leadership Development Conference (1 day) in 2007, 2008, 2010 • Leadership – Going from Good to Great for the Social Sector ½ day seminar • Leadership – The Emotionally Intelligent Leader ½ day seminar • Leadership – What Got You Here Won't Get You There ½ day seminar • Skillsoft Leadership Development Channel Webinars (new initiative) Contact: advanced.leadership@gov.ab.ca for information	

Mentor Training & Support:

- Leadership Program Mentor's Briefing 2 hours
- Mentor with SKL (Skill building session) ½ day

Mentors matched with teams on the 3rd day of Leadership 101. Thereafter they meet once monthly with their team. Mentors are eligible to attend all leadership program training events such as clinics and skill building sessions at no cost.

Figure 2. Leadership Development Program overview, offered to prospective government ministry partners as an introduction to the program.

One opportunity immediately encountered by program administration after the first year of implementation was to provide a cost-benefit analysis. Program graduates gave the program high marks for its quality and practical application to their work (K. Freier, personal communication, January 26, 2011). An external evaluation was completed in February 2004, and an evaluation results memo was sent by Colleen Crickmore to the Human Resources Director of the ministry concluding the program was achieving success on multiple levels (C. Crickmore, personal communication, September 16, 2010). Notably, evaluation results confirmed leadership behaviours were increasing in the organization. The Leadership Practices Inventory® (Kouzes & Posner, 2008), a validated 360-degree assessment tool used in the program, indicated a statistically significant 15% pre–post increase in observed leadership behaviours among the 65 individuals who had graduated since program inception as observed by their peers, supervisors, and their direct reports (C. Crickmore, personal communication, September 16, 2010).

Up to this point in the program's history, participation was only available to AHRE employees. Soon, however, program graduates, mentors, and stakeholders moved to other ministries within the Government of Alberta spreading the news about this unique program. The first partnership between AHRE and Alberta Environment was a natural evolution, as three key AHRE staff members moved to Alberta Environment: Ron Hicks, Deputy Minister; Mary Jefferies, Human Resources Director and a program graduate; and Colleen Crickmore, Leadership Program Manager (and designer). By 2003, the two ministries had entered into a partnership providing the program to blended staff groups. A wealth of fresh perspectives, experiences, and friendships were developed over the next several years as Alberta Environment participants joined AHRE staff members adding to the ever-increasing numbers of program

participants, mentors, and graduates. This partnership between the two ministries was a rare occurrence and was considered an innovative and progressive sharing of resources.

In response to a request from a consortium of government ministries to share information about how to increase their leadership capacity, Linda Camminatore (the program manager at the time) drafted a position paper in the fall of 2006 to present to interested colleagues in other ministries within the Government of Alberta (L. Camminatore, personal communication, January 26, 2011). An expansion meeting, facilitated by Fred Jacques, was held November 8, 2006, involving seven interested ministry representatives. Within a short time, formal agreements to partner were entered into with the ministries of Agriculture and Foods, Innovation and Science, and Alberta Justice. This was a rare occurrence within the government, and just like in improvisational theatre, the story of this program was unfolding in unpredictable ways. As Heemsbergen (2004) wrote in *The Leader's Brain*, "The word 'improvisation' derives from 'improvisus,' Latin for 'not seen ahead of time'" (p. 141). Citing Karl Weick, Heemsbergen described an improviser as someone who can routinely make what he or she needs from what is at hand. In the context of leadership, wrote Heemsbergen (2004), the ability to improvise implies an iterative, dynamic, "process of constructing, performing, and adjusting ideas as a result of close contact with an employee, audience, client, learner, or customer" (p. 142). As this program experience connected people from other ministries, something new and "not seen ahead of time" (Heemsbergen, 2004, p. 141) was created.

Program administration adjusted to the volume of activity by increasing intake allotments up to 90 participants twice annually by the end of 2006 to accommodate the five ministry partners. Changes to ministry names and configurations now had morphed AHRE into the Alberta Employment, Immigration, and Industry (AEII), but the newly named ministry still played host to the Leadership Development Program.

In 2007, the program partnership agreement was extended to Service Alberta, Seniors and Community Supports, Municipal Affairs and Housing, and Sustainable Resource Development. The partnership agreement outlined mutual commitments and obligations. Just like in improvisation, collaboration can be both fruitful and challenging. As Nachmanovitch (1990) noted, "There is another personality and style to pull with and push against. Each collaborator brings to the work a different set of strengths and resistances" (p. 95). Despite the inherent challenges in welcoming new ministry partners,

participation in the program strengthened and, I believe, the program benefited. Nachmanovitch (1990) wrote, “A releases B’s energy, B releases A’s energy. Information flows and multiplies easily” (p. 96) and “learning becomes many-sided, a refreshing and vitalizing force” (p. 96).

On September 18, 2007, a briefing was prepared for the AEII Executive Team and introduced the Advanced Leadership Series, an initiative to provide further development supporting program graduates. The requests for continued learning opportunities and invitations to connect with fellow alumni of the program increased significantly as participants graduated from the program.

By 2008, the addition of Alberta Energy brought the complement of partners to a total number of nine ministries, and when Municipal Affairs and Housing and Urban Development divided into two separate ministries the program partners grew to 10. This made the program available to over 50% of Alberta Public Service staff (more than 17,000 people) by virtue of the size of participating ministries (K. Freier, personal communication, January 26, 2011).

Eight years after its inception, the program had grown in response to participant feedback, and this growth is still underway today. More ministries continue to formally request participation at the time of writing (K. Freier, personal communication, January 26, 2011). In *Everything’s An Offer*, Poynton (2008) invited readers on an imaginary journey to an organization that both delivers results and engages its members:

where you can depend upon people to listen to each other. Not a place where people just stay quiet while others speak, but where they really listen and then act upon what they hear. Throughout this organization people face difficulty with grace. They invite and accept contributions from all kinds of people...their systems are simple and few. People don’t get stuck on their own particular agendas. They learn quickly from each other, which makes turf wars rare. This also allows ideas to flow easily back and forth between different individuals and teams who make simple additions that quickly become better ideas. (p. 39)

Poynton’s (2008) description of an imaginary organization is, I believe, the dream that many organizational members wish for themselves and for their colleagues. Poynton suggested that improvisation troupes perform this way, and that organizational leaders would be wise to pay attention to the skills and abilities that allow them to do so. I wondered if perhaps this program had been helping to generate the kind of positive energy and sense of possibility that

exists in Poynton's imaginary organization and other ministries' leaders were eager to have their employees participate in that kind of experience.

The Leadership Development Program staffing complement has increased from one to four members over the past 9 years, while the number of partners has increased tenfold. Intake numbers have more than quadrupled. At any given time program staff may be serving four active participant groups, delivering programming to graduates, recruiting and orientating mentors, responding to partnering ministry needs, supporting the facilitators of the program (including me), and managing a new intake. In 2010, these elements involved over 1,400 directly impacted program stakeholders including participants, graduates, and mentors (K. Freier, personal communication, January 26, 2011).

Each participant's division is charged \$2,000 for the 18-month learning experience, and that amount has not changed since the inception of the program. Contracted facilitation costs continued to increase to reflect current market rates and cost-recovery mechanisms needed to be monitored with ministry partners to ensure sustainability. The administrative and facilitation part of the budget required to sustain the program has tripled since inception and the cliché, "do more with less," is a common theme within this program, as it is in so many organizations.

The administrative team regularly receives calls from entities external to government requesting information or asking to join the program. Examples of contacts include: TELUS, The City of Edmonton, Edmonton Police Services, Chamber of Commerce, Realty Associations, employment and educational service providers in the community, and private employers. This is a program that continues to attract attention all across the Province of Alberta, and indeed the rest of Canada.

Leadership Alumni Chapters continue to evolve in a self-organizing manner. An Edmonton Chapter was active for many years, and then receded. Later, a Southern Alberta Chapter arose. In addition, a number of leadership teams continue to meet after they have graduated. Although graduates understand that they are to manage themselves if they want to continue their leadership learning together, these groups continue to solicit support from the Program Administration Team as they organize themselves to continue their leadership development. These graduates are eager for reading recommendations, conference opportunities, and chances to connect around a leadership theme or learning event.

The Leadership Development Program requires a network of mentors who support the teams. These mentors are management- and executive-management-level officials selected in proportion to their ministry participants. While mentorship has been a core component since inception, the Administrative Team continues to develop services and supports to a growing cadre of over 100 mentors (R. Nesbit, personal communication, September 28, 2010). In addition to recruitment, informing, briefing, and supporting mentors, there are now efforts to establish evaluation, feedback, and further training processes to support the important role that the mentors play within the program.

The first annual conference for graduates was held November 23, 2007, and 180 graduates and mentors along with the program facilitators, two keynote speakers, and a Deputy Minister Panel attended. The conference evaluation indicated a high degree of success and set the expectation for ongoing provision of high calibre conferences. The Advanced Leadership Series also assembled an Advisory Team of Graduates who meets several times annually to explore the needs of graduates and generate ideas and feedback to administration.

The challenge remains around how to accommodate increasing numbers of graduates with their expectations for further development needs while maintaining the current leadership program structure with available financial resources. It appears that this is a program that generates ongoing interest in leadership for many of its graduates and that many see it as simply one chapter of an ongoing development story.

Webinar and electronic offerings are now considered a valuable post-graduation resource. Cost-effective experiments of showing a variety of leadership scholars' electronically available presentations indicated that graduates benefited from quick (usually 2 hour or less) interactive web-based sessions. This extension of the leadership learning that seems to begin with the program experience itself is an exciting outcome of the program, and as a researcher I benefited greatly from the graduates' eagerness to reconnect and talk about leadership.

Despite its wide appeal throughout the entire Government of Alberta, this program maintains its grassroots home, in the ministry in which it began, to this day. Tables 1 to 4 provide information regarding participation in the program up to time of writing.

Table 1

Listing of Leadership Program Inter-ministry Partners by Department

Department	Partners
Employment and Immigration	Environment
Agriculture and Rural Development	Service Alberta
Municipal Affairs	Sustainable Resource Development
Justice and Attorney General	Seniors and Community Supports
Housing and Urban Affairs	Energy
Education	Corporate Human Resources
Treasury Board	Culture and Community Spirit
Public Affairs Bureau	

Table 2

Graduates, Mentors, and Participants (2001–2010)

Participants	No. of Participants
Total Graduates	1,161
Total Mentors	263
Total Current Participants	473
Grand Total	1,897

Table 3
Participant Numbers and Mentors by Group

Group (graduation date)	No. of Participants	Mentors
Group 1 & 2 (2003)	37	6
Group 3 (2003)	29	5
Group 4 (2004)	43	7
Group 5 (2004)	37	7
Group 6 (2005)	60	9
Group 7 (2005)	51	9
Group 8 (2006)	43	8
Group 9 (2006)	55	11
Group 10 (2007)	64	11
Group 11 (2007)	57	11
Group 12 (May 9, 2008)	76	15
Group 13 (June 13, 2008)	78	15
Group 14 (October 24, 2008)	36	7
Group 15 (May 1, 2009)	100	19
Group 16 (June 26, 2009)	100	19
Group 17 (April 16, 2010)	125	21
Group 18 (June 11, 2010)	170	28
Group 19 (started fall 2009 in-progress)	183	30
Group 20 (started winter 2010 in-progress)	147	25
Group 21 (started fall 2010 in-progress)	143	24

Table 4

Participation Ratio by Role (that Participants Perform) within the Government of Alberta

Participant by Role (%)	Role Within the Government
10%	Administrative Support
80%	Professional/Technical
10%	Management

My Relationship to this Program

I am one of four facilitators within the program and have participated in its design, evolution, and delivery. It is a program about which I care deeply, and being a facilitator within it has allowed me to experiment, play, and learn about leadership development as I grew my own skills. I also realized that I needed an organization in which to systematically study and learn about the influences of the work I do, and the people involved in this leadership program were open to welcoming me as a researcher. Improvisers learn to pay careful attention to the obvious and to make use of any offer they notice within a scene or situation in order to move a story forward.

Improvisers sometimes express this practice as “use what you have.” . . . If the practice is “use what you have” then “what do I have?” is an obvious question you can attack immediately, which gives you as simple, easy way to get going. (Poynton, 2008, p. 62)

I reflected on the question: “What do I have as a program to study?” This program was an obvious choice.

Although this leadership development program was not designed deliberately from a social constructionist stance (I had never heard that term before 2006), the faculty team and administrators seem to embody these ideas as we deliver and facilitate the program. Examples of this embodiment include a 6-month online experience (before meeting each other in person) during which all participants are invited to share their life stories, their work experiences, and to make explicit their assumptions and belief systems about leadership. The intention of the online experience is to connect participants with each other from all over the province and to build the practice of open, healthy dialogue while offering a shared experience of reading leadership

literature and responding to it. Emphasis is placed on the idea that there are no right or wrong answers when it comes to defining leadership and it is in dialogue with each other, even when that dialogue takes place online, that we begin to collaboratively make meaning together.

Another example of the embodiment of social constructionist principles within the program happens when participants do finally meet each other in person. The beginning exercises are focused on building relationships, sharing life stories with each other, and honouring the diversity of participants. Facilitators focus first on cocreating a safe, open learning environment before focusing on content. As the program continues, facilitators and program administrators consistently invite the participants to reflect on their processes by asking questions: How are you doing as a team? What do you need to do more of or less of to gain the most from participating in this program? What conversations can you invite that will positively influence your learning experience?

The curriculum and design of the program also reflect social constructionist ideas such as navigating difficult conversations with compassion and openness, the benefits of participating in appreciative inquiry, and exploring adaptive change processes. The curriculum is important and I acknowledge that, yet it is the overarching emphasis on relationships and process throughout the entire program experience that most reminds me of the practical application of social constructionist perspectives. Borrowing from Harlene Anderson's (2009) language in a recent Taos Institute newsletter, I was curious how these constructionist perspectives "inform the way that we think with, talk with, respond with, and create with the people that we meet" (p. 2).

I believed the design and delivery of this leadership development program had been informed by social constructionist principles (though not explicitly), and I was eager to ask and attempt to answer the question, "So what?" What difference is this program making to its graduates and what is changing for them, because of their participation in it?

Over the past 10 years, the Government of Alberta invested time, energy, and resources to not only develop and design this program, but also to promote, sustain, and improve it. The program has garnered awards of excellence; it has spread throughout several government ministries and attracts hundreds of applicants each year; and other organizations' leaders are curious to learn more about the workings of the program, along with understanding more clearly what differences the program is making for the participants, and

for the organization. The world is changing rapidly, organizations are challenged to keep up, adapt, and respond, and the need for more leadership from all levels is consistently requested in the leadership development field in which I work. By learning more about this program's influences, I hoped to be able to share valuable insight that might help inform and encourage other organizational leaders (and leadership development practitioners) to move forward together to cocreate new possibilities.

Chapter Two: Review(er) of the Literature

The Purpose of a Literature Review

According to Bruce (2007), the primary purpose of a literature review is to provide readers with background and justification for the research undertaken. Literature reviews are not, however, just for the benefit of readers. According to Bournier and Frost (1996), there are several benefits to the researcher while conducting a thorough literature review and several important reasons to invest wisely in this stage of the research process. These reasons include the following: identifying gaps in the literature to better understand what is worthy of study, avoiding reinventing the wheel, identifying opposing views, putting one's own work into perspective, identifying methods that might be relevant to the study, increasing one's breadth of knowledge in the subject area, and discovering other people working in the same fields because a researcher network is a valuable resource (Bournier & Frost, 1996). I intentionally titled this chapter "Review(er) of the Literature" because my voice is prominent throughout as I interpreted and made connections in relationship to my ongoing thinking about leadership and its development in organizations. This chapter is as much about the reviewer as it is about the literature reviewed.

Introduction

To explain how this research study was conceived, I offer an exploration of three topics that informed the grounding for the inquiry. First, I examine the notion of leadership and how the literature offers us a vast, and dare I say, confusing interpretation of what that well-used word might mean. It has been 26 years since James Meindl, Sanford Ehrlich, and Janet Dukerich (1985) noted that "it has become apparent that, after years of trying, we have been unable to generate an understanding of leadership that is both intellectually compelling and emotionally satisfying. The concept of leadership remains elusive and enigmatic" (p. 78). I contend that not much has changed since 1985. Agreeing on what the word leadership means is far from easy, so in this literature review I offer my own perspective, describe how my perspective evolved, and how it continues to evolve.

Second, I examine the concept of organizational culture, which—like leadership—is a broadly conceived, difficult to define, and rather slippery phenomenon. Myerson (as cited in Denison, 1996) noted, "Culture was the code word for the subjective side of organizational life . . . its study

represented an ontological rebellion against the dominant functionalist or ‘scientific paradigm’” (p. 619). When my organizational clients ask for help and support around their leadership development initiatives, it is often an attempt to shift and improve their organizational culture. For me, the topics of leadership and organizational culture are inextricably related.

Third, I examine what the current literature offers about leadership development and the persistent quest (by leadership development practitioners, academics, and organizational leaders) for methods with which to measure and evaluate the effectiveness of leadership development initiatives. Dexter and Prince (2007) argued that even though many organizational scholars push for evidence-based, scientifically valid, and reliable assessments of leadership development programs, “some describe the search for evidence as one for ‘the holy grail’ . . . admitting there may be some tangible benefits to finding evidence . . . if only we knew where to search” (p. 611).

Woven in with each of the above sections, I examine a social constructionist approach to leadership, leadership development, and organizational culture. I have always been interested in ideas that stand a chance of making our relationships, organizations, and communities more positive, fulfilling, and playful. Social constructionist perspectives towards leadership development and organizational culture were exciting ideas for me and they permeate the major topics under review. The more I read in preparation for conducting the research, the more I agreed with Gergen and Gergen’s (2004) assertion:

Once consciousness of construction sets in, it is difficult to sit still . . . when you realize that all we take to be true, rational, and good is only so by virtue of convention, you begin to ask questions of unsettling significance. Why must we accept what tradition has dished onto our plate; what are we missing; could we reconstruct; would it be better? (p. 47)

Before diving into my interpretation of the literature, I preface it with a reminder that, “It is in our nature to dramatize” (Mamet, 2000, p. 3). This literature review is my attempt to tell a story that supports my research approach and its importance. As Mamet (2000) wrote in *Three Uses of a Knife*,

At least once a day we reinterpret the weather—an essentially impersonal phenomenon—into an expression of our current view of the universe . . . the weather is impersonal, and we both understand it and exploit it as dramatic, i.e., having a plot, in order to understand its meaning *for the hero*, which is to say for ourselves. (p. 3)

I was conscious, as I wrote this, that I was writing selfishly. I have been reading and studying leadership literature for more than 12 years for both professional and personal reasons. My reading has altered me. It has changed the way I see myself and my relationships, and the way I see the world. Mamet (2000) suggested that we dramatize situations, new learning, and incidents “by taking events and reordering them, elongating them, compressing them, so that we understand their personal meaning to us—to us as the protagonist of the individual drama we understand our life to be” (p. 4). My interest in leadership and its development has been an integral part of my own life’s unfolding drama. Even though Chapter Two of this dissertation report was written primarily to meet academic requirements and to help situate and contextualize the research story, the review is deeply personal because it is a story that I, as reviewer of the literature, created.

Upon reading the first draft of this dissertation, Dr. Dan Wulff observed that I had not adequately described the research studies referred to within this chapter. Dr. Wulff (personal communication, June 3, 2011) commented, “There are no comments about the methodologies these studies used—this makes me think they are not research studies, but rather theoretical writings.” Wulff’s insightful feedback prompted me to acknowledge that most leadership and organizational culture literature is theoretical in nature. The research studies that have been done are typically quantitative using primarily questionnaires and surveys (Harter, 2008; Jackson & Parry, 2008; Storey, 2004). Even the qualitative studies tend to be positivist in tone examining “how to increase levels of leadership skills within individual leaders . . . there is a major need for research into how to develop the processes of sharing leadership complemented by more experimental work” (Jackson & Parry, 2008, p. 120). I struggled to find leadership research conducted from a constructionist stance despite several scholars’ theoretical propositions (Bushe, 2001; Gergen, 2009; Hosking & McNamee, 2006; Oliver, 2010). It was the dearth of qualitative research studies conducted from a constructionist stance that prompted me to be bold in my own research.

Major Topics

Leadership. When the word leadership pops up in conversation I have noticed that almost everybody has a leadership story to share. Some stories prompt feelings of excitement and hope because something wonderful has happened when a situation seemed insurmountable. Other leadership stories create a sense of frustration or dismay because the storyteller is disappointed in

his or her story's outcome and talks about the negative influence that particular people and a perceived lack of leadership had on a situation. The idea of leadership has a personal connection to most of us, based on our life experiences and the relationships, communities, and organizations of which we have been a part. As Warren Bennis (2007) wrote in his introduction to a special issue of the *American Psychologist* that focused on the topic of leadership,

Leadership is never purely academic. It is not a matter such as, say, string theory that can be contemplated from afar with the dispassion that we reserve for things with little obvious impact on our daily lives. Leadership affects the quality of our lives as much as our in-laws or our blood pressure. (p. 2)

Despite the personal nature of this phenomenon we call leadership, this dissertation is a piece of academic writing, and I wanted (and needed) to explore these topics with an academic mindset. Whether in an academic setting or a less formal one, a question I often ask when beginning a conversation about a certain word, idea, or concept is: What might the word mean to those of us involved in this conversation? Warren Bennis (2004) began his seminal book, *On Becoming a Leader*, with the oft-quoted phrase: "People wanted The Truth [about leadership], and I was giving them opinions. To an extent, leadership is like beauty: it's hard to define, but you know it when you see it" (p. 1). Dictionary.com defines leadership four ways: "1. the position or function of the leader . . . 2. ability to lead . . . 3. an act or instance of leading; guidance; direction . . . 4. the leaders of a group" ("Leadership," 20110, para. 4–22). Asking conversational partners what they mean when they use the word leadership tends to open a proverbial can of worms—and I am about to open one of those right now.

Keith Grint (as cited in Jackson & Parry, 2008) reported that most leadership scholars tend to look at leadership in one of four very different ways:

Leadership as Person: is it WHO "leaders" are that makes them leaders? Leadership as Results: is it WHAT "leaders" achieve that makes them leaders? Leadership as Position: is it WHERE "leaders" operate that makes them leaders? Leadership as Process: is it HOW "leaders" get things done that makes them leaders? (p. 13)

It is these four vastly different (and interrelated, I surmise) perspectives from which one might begin exploring leadership that make Bennis's (2004) suggestion that leadership is difficult to define, in my opinion, an

understatement. The challenge in clearly defining what leadership means created my greatest challenge in talking, writing, and researching the phenomenon.

Leadership is a phenomenon that everyone has an opinion on but few seem to agree exactly on what it really is . . . there are almost as many different definitions of leadership as there are persons who have attempted to define it. (Jackson & Parry, 2008, p. 12)

I have varied opinions about leadership and how I might define it, always dependent on the circumstances in which I find myself. The moment the circumstances shift, however, or I gain insight into different aspects of the situation, there is a great likelihood that my fluid definition of leadership (and how it might be happening) will shift too. It was a relief to read Meindl's (1995) assertion:

Much sweat and tears have gone into redoubled efforts to remediate leadership studies by disentangling, decoupling, or separating leadership from its origins: objectifying it—cleaning it up, so to speak—so that researchers can better work with it as a scientific construct, independent of its lay meanings. (p. 340)

My relief in reading Meindl's (1995) statement was two-fold. First, it felt good to know that I was not alone in my struggles to articulate a precise definition of leadership. Second, with my relatively new understanding and appreciation for a social constructionist perspective (Drath, 2001; Gergen & Gergen, 2004; Gergen, 2009; Hosking & McNamee, 2006), I realized that no matter how appealing it might have been to Meindl (1995) and his contemporaries to clean up and objectify leadership as a scientific construct, it is impossible to separate the concept of leadership (or any concept, for that matter) from its origins and its context, from its ongoing story.

That written, it seemed ludicrous to invest time here attempting to define, within this literature review, what leadership really means. Very few have ever agreed on that (Avolio, 2005; Grint, 2005; Jackson & Parry, 2008). The best I can do is to offer you my current interpretation of the concept based on my reading, life experiences, and my work as a leadership development practitioner. This is important to share because my interpretation of the word leadership influenced the design, conduct, and findings of this study.

Before offering you my interpretation of the term—which Mamet (2000) reminded us earlier is intended to support my current view of the universe—I will share with you how others have interpreted the word leadership and studied the concept. Reading about leadership and the myriad

of interpretations confused matters for me. I often emerged from my reading sessions less clear than when I started. Three intriguing observations did strike me as I read, and I share them up front.

First, discerning two different words—leader and leadership—and exploring how they might relate with each other became, through this literature review journey, of utmost importance to me. Many leadership scholars, it seemed to me, came to this area of study with an assumption that the two words must belong together. If we experience leadership, much of the research implied, there must have been a leader responsible for producing it. Jackson and Parry (2008) stated,

It seems sensible to start a discussion about leadership with a discussion about the leader. In fact, leadership research has been dominated by an interest in leaders. To be specific, research has looked at who the leader is (leader identity), and what the leader does (leader behaviour). (p. 23)

Is it possible, I wondered, to experience or participate in leadership without an individual leader? That question hovered in the back of my mind throughout my reading and writing process. The words leader and leadership are often used interchangeably in the literature.

A second observation I made as I reviewed the literature was noticing the difference between writers who viewed leadership as a phenomenon that can happen anywhere (within our families, communities, personal relationships) and leadership that happens strictly within a formal hierarchy (at work, for example, where a specific person is designated a leader through his or her job title because of the positional power he or she holds within the organization). The latter produces a more orthodox, traditional, and “hegemonic view” (Jackson & Parry, 2008, p. 83) of leadership, presupposing that leaders are always the people in charge and followers are the people who are influenced by those leaders. My bias and interest lies with the former view. I have witnessed and participated in experiences during which I noticed leadership in action, despite the lack of a formally designated leader, or boss. I agree with scholars Kouzes and Posner (2007) who argued the following:

Leadership can happen anywhere, at any time. It can happen in a huge business or a small one. It can happen in the public, private, or social sector. It can happen in any function. It can happen at home, at school, or in the community. The call to lead can come at four o'clock in the morning, or it can come late at night. (p. 8)

I discovered that most of the leadership literature explored leadership within the context of hierarchical organizations (Jackson & Parry, 2008). I was interested in a much broader interpretation of leadership than is investigated in much of the historical and current research.

Third, I observed that most leadership literature is written with an overarching assumption that leadership is a good thing. Whatever leadership is (remember that it is a word difficult to define), most scholars write about it as a phenomenon that we all want, or that we perhaps should want if it is not evident. This underlying belief that leadership is a positive phenomenon leads to a presumption that exploring how to create and nurture effective leadership is always a desirable and worthy goal. James MacGregor Burns (2005) posited,

Leadership, in common parlance, is “good.” When people call for leadership, or deplore the lack of leadership, they see it not as a needed spur to human progress but, as in itself, a moral and ethical entity and a necessary gauge of action. Leadership, in short, becomes an activity as well as an academic enterprise. (p. 12)

This dissertation does not seem the place to debate whether or not leadership is always a good thing. That inquiry would invite a philosophical dialogue that would take me completely off track. There are authors such as A. Roberts (2004) and W. Roberts (1989) who explored the leadership stories of people like Attila the Hun and Adolf Hitler and posed provocative questions regarding the legitimacy of calling something leadership that resulted in outcomes that most regard as destructive and horrific. Does one still call a phenomenon leadership when in the end, the result is suffering, torture, death, and other brutal acts of injustice? This is a fascinating question that will remain unexplored here.

I have chosen to align myself with Burns’s (2005) suggestion that the phenomenon of leadership is commonly thought to result in bettering a situation or moving things forward in a positive direction for those involved. In the last sentence, the value-laden nature of this phenomenon we call leadership becomes glaringly obvious. My biases, values, and ways of seeing the world will dictate what bettering a situation and moving things forward in a positive direction looks like—to me.

Another person, of course, may see the very same situation completely differently, depending on his or her values and beliefs. We often label others as leaders and believe they demonstrate leadership when we notice them speaking up, taking a clear stand, and inviting action around issues that align with our

own values. Kouzes and Posner (2007) asserted that leaders have an “unwavering commitment to a clear set of values. They all are, or were, passionate about their causes . . . people expect their leaders to speak out on matters of values and conscience” (p. 46). The complexity created by acknowledging that leadership often appears in the eye of the beholder (based on the beholder’s values of course) muddies the already murky leadership waters. Bennis (2007) reminded us that “one of the greatest challenges for students of leadership is to find an academically respectable way to deal with the value-laden nature of the subject . . . values are part of the very fabric of the phenomenon” (p. 3).

I have intentionally taken space within the beginning of this chapter to share three observations that, I hope, allow me to let go of the need to define, once and for all, what leadership means. Instead of trying to develop and agree on one universal definition of leadership, Jackson and Parry (2008) argued, “It should remain an essentially contested concept that is constantly being discussed and debated” (p. 14). Jackson and Parry’s argument made sense to me, but it also made it exceedingly difficult to articulate an explanation of the concept within this review and interpretation of the literature. I do hope, echoing the thoughts of Jackson and Parry, that readers will experience what I did as I prepared to write it: “You will have cause to question and deepen your own philosophy of leadership” (p. 8).

In their compelling book, *A Very Short, Fairly Interesting and Reasonably Cheap Book about Studying Leadership*, Jackson and Parry (2008) offered a thorough (and I dare say entertaining) overview of the current state of affairs when it comes to studying leadership. Jackson and Parry admitted up front their awareness that “many readers can be initially put off by the dense conceptual language that is used by academics to communicate with each other and conclude that perhaps leadership research or academic research in general is not for them” (p. 21). To offer a fresh, inviting alternative, Jackson and Parry have written a well-referenced book in clear, simple language that challenged me to clarify my own starting place as a researcher interested in leadership. Jackson and Parry acknowledged that because there are several standard organizational theory textbooks that do “a sound job of providing a historical overview of the development of leadership theories” (p. 20), they were not going to repeat material that was readily available elsewhere. Instead, they offered a concise summary that, along with backup and excerpts from other leadership scholars (Burns, 2005; Covey, 2004; Friedman, 2007; Gergen & Gergen, 2004; Grint, 2005), I decided was worthy of sharing here. Having a

sense of the history behind leadership research and theories certainly supported me in deciding how to move forward through this dissertation process.

Individual leader trait theories. Accounts about the history of leadership theories usually begin with a description of early researchers' interest in individual leaders (Covey, 2004; Gergen & Gergen, 2004; Grint, 2005; Jackson & Parry, 2008). Underlying this early approach was the recognition by scholars of the importance of leadership and the assumption that leadership is rooted in the characteristics that certain individuals possess. Grint (2005) suggested that Western society especially seemed to be obsessed with identifying a single individual or heroic leader who was responsible for delivering leadership. Commonly referred to as great-man or trait theories, Covey (2004) explained that from this perspective, a leader "is endowed with superior traits and characteristics that differentiate him from his followers. Research of trait theories addressed the following two questions: What traits distinguish leaders from other people? What is the extent of those differences" (p. 353)? Early research tended to be concerned with the qualities that distinguished leaders from nonleaders or from followers (Jackson & Parry, 2008), implying that leaders were born, not made. One either came into the world as a leader, complete with all of the necessary traits and characteristics, or one did not—as simple as that. The simplicity of trait theory research "reduced its attractiveness . . . has been discredited, and is really not valid now" (Jackson & Parry, 2008, p. 24).

In the 1940s, scholarly reviews of these early trait studies (Stogdill, 1974) prompted researchers to take a different view of the underlying forces and elements behind leadership. In reviewing the trait theory literature, Stogdill (1974) found that while some leader traits were common across a number of studies, the overall evidence suggested that persons who are strong, effective leaders in one situation might not be effective leaders in other situations. Certain leaders may, in fact, fail terribly in a different context. Subsequently, leadership was no longer characterized as an enduring individual trait.

Situational leadership theories. Due to this shift in thinking, some scholars moved on to exploring leadership behaviours, styles, and situational theories. This research approach presumed that "leadership is the product of situational demands: situational factors determine who will emerge as a leader" (Covey, 2004, p. 353) and how those leaders will behave. Another proposition of this era suggested a need for leaders to change their leadership style in order to adapt to a particular situation or challenge. The situation under

study, according to Jackson and Parry (2008), usually incorporated elements such as the type of events facing the group, the nature of the group and its members, “the state of employee morale, the complexity of the task, and the level of senior management support” (p. 20). These situational and behavioural theories suggested that if leaders could analyze and accurately assess the context and situation in which they found themselves, they could adapt and adjust their behaviour (and leadership style) in order to lead effectively.

Psychoanalytical theories of leadership. Psychoanalysis theories of leadership, grounded in the work of Fromm, Freud, and Erikson (as cited in Covey, 2004) explored how the leader of any group or organization functions as a father or parental figure. The relationship between leadership theory and family systems theory (Friedman, 2007) suggested that the formal leader of an organization may become “a source of love or fear as the embodiment of the superego, the emotional outlet for followers’ frustrations and destructive aggression” (Covey, 2004, p. 353). The intersection of therapeutic practices, family systems theory, and leadership research led to investigations of emotional processes, and how people respond and interact with each other when they work together in organizations (Friedman, 2007).

Leader-role theories (Covey, 2004) advocated that groups or teams are structured based upon the interactions of the members of the group, and the group accomplishes results according to varying roles and positions.

“Leadership is one of the differentiated roles, and the person in that position is expected to behave in a way that differs from others in the group. Leaders behave according to how they perceive their role and what others expect them to do” (Covey, 2004, p. 353). Citing Henry Mintzberg’s research, Covey (2004) reported these various leadership roles that an organizational leader may need to perform in order to meet the needs of a particular group: “figurehead, leader, liaison, monitor, disseminator, spokesman, entrepreneur, disturbance handler, resource allocator, and negotiator” (p. 354).

Humanistic leadership theories. In his summary of humanistic theories about leadership (of which there are many), Covey (2004) reported that researchers holding this theoretical perspective assumed that human beings are by nature motivated beings and that organizations are by nature structured and controlled. Citing the work of Argyris, Hersey and Blanchard, and Maslow, Covey (2004) stated that humanistic scholars believed that “leadership is to modify organizational constraints to provide freedom for individuals in order to realize their full potential and contribute to the organization” (p. 353). According to Jackson and Parry (2008), this humanistic

approach to studying leadership offered insight and a deeper understanding of the phenomenon, but “can be accused of concentrating excessively on top leaders . . . it has little to say about informal leadership processes . . . and has a tendency to focus on formally designated leaders” (p. 31).

The lines among these phases of leadership research are blurry. It is possible, for example, to read relatively current leadership research (Henein & Morissette, as cited in Kelders, 2008) that evidences theoretical perspectives and underpinnings from each of the early phases of leadership studies.

Transformational leadership theories. Jackson and Parry (2008) reported that conventional historical accounts of leadership theories “inevitably conclude with a discussion of ‘new’ leadership theories, which emphasize visionary and inspirational leadership in order to transform organizations . . . an approach that has dominated the literature since the 1980s” (p. 20). Transformational leadership theories are often juxtaposed against transactional leadership theories in order to emphasize the differences between them. Jackson and Parry (2008) described transactional leadership as a process that involves an exchange between the leader and the follower wherein the leader offers rewards in return for compliance and performance. “The transaction between leader and follower is usually represented in formal contracts, employment agreements, performance management systems and service-level agreements” (p. 29). There is an implication within transactional theories that the leader is the formally designated manager or boss, has positional power over the follower, and has the authority to supply both reward and punishment.

Transformational leadership theories, on the other hand, emerged from researchers in the 1980s and “signalled a new way of conceptualizing and researching leadership and they are still going strong” (Jackson & Parry, 2008, p. 28). Citing the work of Bass, Bennis, and DePree, Covey (2004) described transformational leadership as a process during which leaders and followers raise one another to greater levels of motivation for the good of the organization. According to Covey’s interpretation of these theories, a transformational leader performs three functions: aligning people, empowering people, and creating change. “Leaders transform organizations by aligning human and other resources, creating an organizational culture that fosters the free expression of ideas, and empowering others to contribute to the organization” (p. 357). According to Jackson and Parry (2008), the underlying nature of these transformational theories is that leadership is much more than a transaction that one imposes upon followers and “the idea of transformational

leadership has generated an impressive set of findings and has made a great impact on the study of leadership . . . it is clear that it won't go away in a hurry" (p. 31). Based on my reading experience, Jackson and Parry (2008) offered a valid point. The leadership and management bookshelves in bookstores continue to feature several newly published volumes that are rooted in transformational leadership theories (Heath & Heath, 2010; Pink, 2009; Rock, 2009; Scott, 2009).

Although these transformational theories are still often referred to as leading edge ideas, "technically speaking, they are no longer very new" (Jackson & Parry, 2008, p. 20). Within a few paragraphs, I will introduce leadership ideas that I do think are relatively new. First, however, I want to return to my interest in this persistent tendency within the literature to focus on how a strong individual leader influences the probability of successful leadership.

The idea that followers are important coproducers of leadership is not new. The possibility that leadership emerges from a relationship based on a mutual exchange between leaders and followers has been explored over decades (Bennis, 2004; Greenleaf, 1977; Hollander, 1958; Pfeffer, 1977). Pfeffer (1977) wrote, almost 35 years ago, that our fascination with individual leaders might derive partially from our desire to "believe in the effectiveness and importance of individual action, since individual action is more controllable than contextual variables" (p. 109).

Despite these early proponents of a more relational understanding of leadership, I am not sure that many have left behind a fascination with individual leaders' characteristics and behaviour. To this day we can read studies that attempt to capture and analyze stories of extraordinary men and women who have led successfully so that we can understand, once and for all, what it is that exemplary leaders really do (Ancona, Malone, Orlikowski, & Senge, 2007; Barsh & Cranston, 2009). Readers are eager to learn who these leaders were, how they were raised, what they did, how they did it, and how we might learn from their experiences in order to improve our own chances at becoming the very best leader possible (Boyatzis & McKee, 2005; George, Sims, McLean, & Mayer, 2007; Kotter, 2002; Scott, 2009).

Despite shifts in focus over the years of leadership research, there has been a persistent desire to better understand and qualify what an individual person might be able to do to lead more effectively. In a relatively recent attempt to synthesize these individualistic leadership theories, George et al. (2007) reviewed more than 4,000 studies from the previous 50 years of

leadership research conducted to determine definitive styles, characteristics, and behaviours of great leaders. No clear leader profile resulted from the efforts. Despite those findings, researchers continue to search for the attributes of exceptional leaders resulting in declarative statements like, “The leader’s job is no longer to command and control but to cultivate and coordinate the actions of others at all levels of the organization” (Ancona et al., 2007, p. 94).

George et al. (2007) reported, “When 75 members of the Stanford Graduate School of Business Advisory Council were asked to recommend the most important capability for leaders to develop, their answer was nearly unanimous: self-awareness” (p. 133). More intriguing to me than the prestigious Stanford advisory council’s seemingly simple and common sense answer, is the very question that was posed to them. Our insatiable desire to understand the capabilities of the world’s best leaders presses us to continue researching in this area that still emphasizes the impact that individuals have on this phenomenon called leadership.

Why, I wondered, are we still so intrigued by the individual leader? I am obviously not the first person to ask that question. According to Pfeffer (1977), leadership is associated with a set of myths “reinforcing a social construction of meaning which legitimates leadership role occupants, provides belief in potential mobility for those not in leadership roles, thereby providing a belief in the effectiveness of individual control” (p. 112). Robert Quinn (2004) posited that in order to participate in a more relational leadership process we must open up with others in order to become cocreators of a new possibility, a new reality. By making that choice, we commit to doing something collaboratively, coordinating our actions with others. That choice demands that we must let go of our individual sense of control and, along with others, “build the bridge as we walk on it . . . I sometimes refer to this process as walking naked into the land of uncertainty or learning how to walk through hell effectively” (Quinn, 2004, p. 9). Letting go of our individual sense of control is painful and uncomfortable for most people, according to Quinn (2004), and he pointed out that painful answers have no market on the leadership shelves of bookstores.

Pfeffer’s (1977) and Quinn’s (2004) fascination with individual control helped me understand why the terms leader and leadership often coexist. Quinn (2004) argued:

The temptation is to believe that one has to be in control in order to make change happen . . . [then] we recognize the truth that we cannot

control transformation, no matter what formal “power” we have. This notion terrifies and paralyzes people. (p. 57)

I think that we long to believe that we can make a positive difference and contribute. Pfeffer (1977) stated, “Given the desire for control and a feeling of personal effectiveness, organizational outcomes are more likely to be attributed to individual actions, regardless of their actual causes” (p. 109). When something goes well within any organization, we want to understand who made it happen. We call that person a leader and name the positive difference they created effective leadership.

Three decades ago, Pfeffer (1977) was already writing about the social construction of this phenomenon called leadership:

Leadership is attributed by observers. Social action has meaning only through a phenomenological process. The identification of certain organizational roles as leadership positions guides the construction of meaning in the direction of attributing effects to the actions of those positions . . . when causality is lodged in one or a few personas rather than being a function of a complex set of interactions among all group members, changes can be made by replacing or influencing the occupant of the leadership position. Causes of organizational actions are readily identified in this simple causal structure. (p. 111)

Pfeffer (1977) expanded on his ideas by explaining why this way of making sense of leaders and leadership has served us so well over the years. If we can celebrate individual leaders as heroes when things go beautifully, we can also blame them and use them as scapegoats when things go wrong. Gamson and Scotch (as cited in Pfeffer, 1977) noted that in baseball, the firing of the team manager served a scapegoating purpose:

One cannot fire the whole team, yet when performance is poor, something must be done. The firing of the manager conveys to the world and the actors involved that success is the result of personal actions, and that steps can and will be taken to enhance organizational performance. (p. 111)

When we can personify a displeasing situation by identifying an individual leader whose fault it must be, it becomes easier to respond than trying to make sense of the complex relationships and social situation in which the problem is occurring. This individualistic stance “serves too many uses to be easily overcome. Whether or not leader behavior actually influences performance or effectiveness, it is important because people believe it does” (Pfeffer, 1977, p. 110). Mole (2004) submitted that the appealing thing about

an individualistic perspective toward leaders is due to the symbolic importance of leaders in traditional organizations, the amount of attention given to the leaders, and the resultant emotional investment in their performance. It means that “when a badly performing one is discarded everyone else feels an instant sense of relief” (p. 128). It is far easier to blame and eliminate one figurehead than share the responsibility and guilt among many, Mole (2004) explained, and “the execution of one messiah expiates a multitude of the sins of others, and allows the search for a new messiah to begin” (p. 128).

A full 20 years after Pfeffer’s (1977) contributions to the leadership literature, Barker (1997) stated,

We have become mired in an obsession with the rich and the powerful, with traits, characteristics, behaviors, roles, styles, and abilities of people who by hook or by crook have obtained high positions, and we know little if anything about *leadership*. (p. 344)

Barker (1997) blamed this individualistic obsession of ours on the influence of our pervasive “feudal paradigm-du-jour” (p. 346) that harkens back to the good old days when the term leader conjured up an image of a powerful male who sat “atop a hierarchical structure directing and controlling the activities of subjects toward the achievement of the leader’s goals . . . normally centered about the defense of the kingdom and the acquisition of new territory through waging and winning war” (p. 346). We may well have moved forward from our image of leader as a powerful male leading a kingdom into battle, but fascination with the assumed influence and impact of an individual leader still dominates much of the leadership research.

Scholarly writing that critiques and questions this tendency to assume that an individual leader and leadership must belong together has been apparent in the leadership literature for many years (Avolio, 1999; Balkundi & Kilduff, 2005; Drath, 2001; Gergen, 2009; Hosking, 2006; Hosking & McNamee, 2006; Meindl, 1995; Vaill, 1998). I suggest that despite writing to the contrary, the pervasive feudal paradigm-du-jour Barker (1997) described is still alive and well. In his article, “Promoting More Integrative Studies for Leadership Theory-Building,” Avolio (2007) asserted that leaders cannot be thought of as separate from the context in which they arise, the setting in which they function, the relationships in which they live, and the system or organization over which they preside. Avolio (2007) argued that the field of leadership studies has primarily focused on the leader to the exclusion of other vitally important elements of the leadership process.

I invested a lot of words exploring the history of the individualistic approach to studying leadership because I wanted to understand the story that we have inherited from our past. Gergen and Gergen (2004) reminded us that no matter what our history, “all that we take for granted can also be challenged” (p. 12). The more I read, the more I realized the depth and strength of the history behind our traditional, individualistic approaches to leadership. I also understood more fully why social constructionist scholars dedicate so much of their writing to explaining, defending, and justifying why the paradigm shift seems difficult to some, and why it is important (Drath, 2001; Gergen, 2009; Hosking & McNamee, 2006; Mole, 2004; Vaill, 1998).

Exploring leadership from a social constructionist stance created an opportunity for me to design research that might open new pathways forward for me, and for the clients with whom I practice. “For the constructionist . . . standing before us is a vast spectrum of possibility, an endless invitation to innovation” (Gergen & Gergen, 2004, p. 12).

Gergen (2009) suggested that regarding our understanding of leadership, “from a relational standpoint, we are barely at the beginning” (p. 331). Gergen contended that the individualist view of leadership is misleading because “none of the qualities attributed to good leaders stand alone. Alone, one cannot be inspiring, visionary, humble, or flexible. These qualities are achievements of a co-active process in which others’ affirmation is essential” (p. 331). Vaill (1998) warned of the tension potentially produced by inviting a relational understanding of leadership because “the relationality of all experience contains challenges to our understanding of organizations that we have barely begun to come to terms with” (p. 18).

I appreciated Vaill’s (1998) acknowledgement of the complexity that a relational stance creates for leadership scholars and practitioners and his explanation of why there may be resistance. Studying leadership becomes more complicated (and more intriguing, in my opinion) if we believe that “relational leadership emerges when people in dialogue create leadership roles and leadership activities among themselves” (Gergen & Gergen, 2004, p. 54). Vaill predicted that if one is open to thinking about leadership as a collaborative group of action takers who effectively perform a set of relationships, then

leadership provides a huge agenda of puzzling relationships for us all to think about and experiment with. We have to learn about relationality—living in relationships—and these open processes

flowing in time do *not* obey the behavioural science theories and laws from the old paradigm's search for "fixed and neutral" facts. (p. 19)

Bennis (2007) took a more pithy approach to expressing a relational perspective and declared "the only person who practices leadership alone in a room is the psychotic" (p. 3). Citing the late Massachusetts Institute of Technology psychologist Alex Bavelas's advice to students, Bennis added, "you can't tickle yourself . . . leadership does not exist in a vacuum . . . leadership is grounded in a relationship" (p. 4). If one agrees with Bennis (2007), Gergen (2009), and Vaill (1998), when good (or bad) things happen in a given situation it is not because of single individual. Instead, it is due to "animated relations . . . the generative interchange among the participants" (Gergen, 2009, p. 333).

Bennis (2007) described William Shakespeare as one of our earliest and wisest students of leadership for debunking the so-called "great man" theory of leadership before it was ever explored by leadership scholars. Citing Shakespeare's *Henry IV, Part I*, Bennis shared the story of the character Glendower bragging about his own remarkable leadership capacity: "Glendower boasts to Hotspur, 'I can call spirits from the vasty deep.' And Hotspur shoots back, 'Why so can I, or so can any man; But will they come when you do call them'" (p. 3)? Summoning spirits from the vasty deep is not leadership until those spirits choose to appear. Leadership is a dynamic phenomenon that comes into being between and among the players involved—in Shakespeare's plays, and in real life.

Gergen (2009) submitted "there now exists a cadre of organizational scholars and practitioners who variously reflect a deep concern with relational process" (p. 333). As I reflected back on the leadership reading I have done over the past 12 years, I assumed that Gergen's use of the word concern was not meant negatively, but implied scholars' deep interest in exploring a relational approach. Kouzes and Posner (2006), often recognized as writing from a primarily individualistic transformational leadership perspective, regularly emphasized the importance of relationships and pronounced firmly in *A Leader's Legacy*:

In leadership, nothing that we achieve is singular. Nothing. It doesn't matter whether you're the CEO or shift supervisor, the executive director or the volunteer coordinator, the principal or the team captain; you never, ever do it alone . . . leadership is a relationship. (pp. 45)

A relational perspective has been presented in the leadership literature for many years (Bushe, 2001; Kouzes & Posner, 2007; Vaill, 1998) often

woven in with more individualistic notions about exemplary leaders and their attributes and characteristics. I knew all along that the relational ideas intrigued me, made sense to me, and energized me. I simply had no language for it, so could not name it. Now I can.

In *Clear Leadership*, Bushe (2001) promoted a new way of thinking about people within organizations, human interaction, and the nature of leadership. When things are going poorly within an organization, Bushe suggested, “It isn’t just problem people. Rather, it is a system of interaction that most of us take as normal or natural” (p. 3). Bushe offered the phrase “interpersonal mush” (p. 5) to describe the murkiness that sets in when our understanding of each other is rooted in fantasies and stories we have made up about each other, rather than open dialogue. Bushe argued that avoiding dialogue leads to destructive patterns and we “need to learn together to create more effective ways of operating in relationship” (p. 5). When things are not moving forward smoothly, an individualistic approach prompts a strong urge to blame a person, or a few specific people. An individualistic stance encourages us to figure out whose fault it is and who deserves to be punished. As Bushe (2001) noted, choosing a relational stance invites us to accept that “everyone involved contributes to the creation, maintenance, and change of the reality or truths they face at work . . . clarity comes from clearing out the interpersonal mush and sometimes requires an organizational learning conversation” (pp. 11–12). Bushe did not imply that the dialogue required in order to participate in these organizational learning conversations is easy or comfortable.

Isaacs (1999) wrote about the challenges inherent in creating a “container for dialogue” (p. 244) and warned that it takes patience and deliberate practice to enable “conversations to happen that simply had not taken place before” (p. 245). Isaacs described the container for dialogue as evolving and deepening over time because “containers hold a particular kind of pressure. As they become more stable and conscious, they can hold more pressure” (p. 244).

Vaill (1998) used the phrase “pushy collegiality” (p. 243) to describe working relationships in which people, all together, are invited to explore what they notice, think, and feel in response to a situation. “One is not usually pushy in a vacuum. One is pushy for, with, and yes, sometimes against others. The pushiness is collegial; the collegiality is pushy” (Vaill, 1998, p. 243).

Christine Oliver (2010) wrote that in change-making dialogues, “this positioning of self and other in the conversation lends itself to a commitment

to attempting to make sense of muddles, difficult patterns, confusions, trouble in communicating” (para. 9). Oliver reinforced the notion that this process is not always comfortable: “This is not an approach that thinks or acts in terms of simple cause and effect but that sees realities as being *made between us* through conversations in the present, inextricably linked to conversations of the past and future” (para. 6). The word leadership takes on an entirely new meaning if we come to it with a we-are-all-in-this-together mindset.

In *The Deep Blue Sea: Rethinking the Source of Leadership*, Drath (2001) began his book by crediting Ken Gergen, Robert Kegan, and Etienne Wenger for their influence on his thinking about relational leadership, which Drath defined as leadership “that pays attention to the whole system of relations (the deep blue sea) as the creative ground for leadership” (p. xv). Drath presented his assumptions about relational leadership clearly:

Individuals are interpenetrating *relationalities* who actually come into being as various kinds of individual persons through connection, interrelation, language, joint action, and the shared creation of knowledge. I will therefore assume that in trying to make leadership happen while working together, people construct one another and *become* such things as leaders and followers. (p. xvi)

What I especially appreciated about Drath’s (2001) ideas is that he managed to introduce a relational approach to the phenomenon called leadership, while still honouring the “uniquely glorious identity of individual persons” (p. xvi). Drath raised provocative questions about the source of “that unique identity” (p. xvi) and invited us to consider this relational perspective:

The glory of our uniqueness comes from our ways of being with others, from our participation in families, groups, communities, and yes, organizations, jobs, task forces, committees. We are who we are, think what we think, love what we love, because of our engagement in creating shared meaning and knowledge with others. (p. xvi)

By exploring leadership as a relational phenomenon by “centering ongoing relational processes as they make people and worlds” (Hosking & McNamee, 2006, p. 10), we immediately invite new questions. Drath (2001) asked: How do people working together in teams, groups, organizations bring leadership into being; how can their capacity for leadership be increased; is the leader role necessary; is the follower role necessary; are there other roles we have not yet imagined? I found Drath’s questions both provocative and inviting. If one is open to exploring the answers to these questions with others, then a relational approach to leadership shifts our focus from what it is that we

do as individuals to what it is that we make together. Leadership becomes something that we perform together, in relationship with each other, rather than an act that one individual does to another. Leadership becomes a dynamic, fluid process during which we make meaning of our current situation together and move forward collaboratively.

I was struck by the strong connection between a relational way of looking at leadership, and the way I understand improvisational principles. The word performance (Hosking & McNamee, 2006) is used often within the social constructionist literature, and the reasons for my attraction to this relational way of looking at leadership were becoming ever clearer. Improvisational performers accept that they cannot create a compelling story by themselves; they need each other and they need an audience. I would suggest that the performance of leadership is similar; we need each other. No matter how talented, bright, experienced, or wise I am, I cannot produce leadership without others.

I began collecting relational leadership questions that prompted a feeling of possibility. Caroline Ramsey (2006) closed her chapter in *The Social Construction of Organization* (Hosking & McNamee, 2006) with a list of questions with which readers might explore her poems contained throughout the book. Many of the questions prompted me to reflect on possibilities that open up within leadership development initiatives if we took the time to ask them. Ramsey asked,

If a manager is diagnosing, leading, inspiring, motivating etc. etc. what are the others doing; how would treating ourselves as a process of relating rather than as an individual author of action change our ideas of managing others; are relationships the product of personal differences or of moments; if we assume the latter, what options does this offer us in our working relations; what managerial actions become sensible when you see organizations as the result of moment-by-moment improvising? (pp. 21–22)

Hosking and McNamee (2006) confessed that “when comparing notes on how we each feel when asked what we mean by ‘social construction’ we found that we both feel a rush of anxiety” (p. 27). Having met both Dian Marie Hosking and Sheila McNamee in person (and having been impressed with their fluency with social constructionist ideas), I was surprised to read this acknowledgement of their anxiety. I have always struggled to explain leadership from a relational perspective unless I compared and contrasted it with the hero-on-a-white-horse-who-saves-the-day approach. Hosking and

McNamee (2006) wrote that relational leadership “can perhaps be better understood by being contrasted with the more usual focus on individual actions and individual sense making . . . we are talking about the coordination of activities among people” (p. 27).

Cranfield University’s (2007) book summary of Grint’s *Leadership: Limits and Possibilities*, proposed that “leadership is a complex series of paradoxes . . . what we make of it depends upon our perspective . . . there may be no consensus” (p. 2). Grint’s (as cited in Cranfield University, 2007) proposition had merit from my perspective, and it helped me understand why scholars have so much trouble agreeing on what constitutes somebody we may call a leader, and what the word leadership might mean. It is time, however, to share how I chose to interpret the word leadership in the context of this research.

I turned to the opening of Kouzes and Posner’s (2007) *The Leadership Challenge* in which they cited Alan Keith of Genetech: “Leadership is ultimately about creating a way for people to contribute to making something extraordinary happen” (p. 3). Keith’s (as cited in Kouzes & Posner, 2007) words prompted me to nod my head—when people collaborate and open up with each other in order to cocreate a new reality for themselves, their clients, or their organization I do think that leadership is happening—somehow. Leadership, from my perspective, is a dynamic and fluid process that is “produced by people coordinating their activities” (Hosking & McNamee, 2006, p. 25).

Perhaps, as we reflect back on a particular episode or experience, we decide that certain people contributed in a way that upped the caliber of our collective leadership performance—and we decide to call them leaders of that experience. Perhaps, in other situations, we notice that we all made things happen in relationship with each other and we cocreated the performance as an ensemble. All of us were leaders, or none of us were, yet somehow leadership was performed beautifully. As I thought about what my clients want when they ask about developing effective leadership within their organizations, they are hoping to invite open conversations that crack open possibilities for creating new realities in order to make things better for all involved. My definition describes leadership as a relational phenomenon that is socially constructed collectively by those involved, and by those who observe and hear the stories about whatever happened.

This definition of leadership was pivotal in preparing to conduct the research. As this section draws to a close, my hope is that I have explained

how I have made meaning of the word, and how I arrived at my interpretation. I agree with Hosking and McNamee's (2006) suggestion that we know that we are in the presence of leadership unfolding around us when we experience,

a valuing of ways of relating that could variously be described as allowing all voices to be heard (multiplicity), staying open, keeping the conversation (relations) going. This draws our attention to the process of constructing realities as well as the relationships within which realities are constructed. (p. 30)

Organizational culture. Like the word leadership, organizational culture is a phrase that is difficult to define. You might be gasping in frustration thinking, oh no, here we go again. Just as in the preceding section, I turned to Dictionary.com to explore the definitions of the words organizational and culture. Organizational is an adjective "of or pertaining to an organization . . . conforming entirely to the standards, rules, or demands of an organization, especially that of one's employer" ("Organizational," 2011, para. 7–8). Culture is defined as, "the quality in a person or society that arises from a concern for what is regarded as excellent in arts, letters, manners, scholarly pursuits" ("Culture," 2011, para. 4).

These definitions were helpful, yet I realized how often my leadership development colleagues and I use the phrase organizational culture—among ourselves and with our clients—assuming that each of us knows precisely what we mean. Once again, I have interpreted the literature from my perspective in order to clarify my choices in how I made meaning of the phrase during the conduct of this research initiative.

At a Taos Institute (n.d.b) conference in Sarasota, Florida, a presenter assured me that a state of frustration is natural when writing for an academic audience because of the perceived need to articulate, definitively, what specific words and phrases mean. Citing Jack Mezirow, Ilene Wasserman (personal communication, September 26, 2008) shared from her session handouts, "As there are no fixed truths or totally definitive knowledge, and because circumstances change, the human condition may be best understood as a continuous effort to negotiate contested meanings." Let the negotiation of contested meanings about organizational culture begin.

In this section of the literature review, I will first introduce a variety of explanations of the term organizational culture. Then, I will explore how a constructionist approach to exploring organizational culture opens up new possibilities for talking about and performing organizational culture. The focus of this dissertation is on leadership development within a large organization, so

this section of the review will also examine how leadership and its development are, from my perspective, intimately related to organizational culture.

Edgar Schein (2004) wrote, “Culture is an abstraction, yet the forces that are created in social and organizational situations that derive from culture are powerful” (p. 3). When I hear that something is an abstraction, I wonder how I might ever begin to understand it fully. Like the metaphor describing a fish swimming in water not even realizing it is in water, organizational culture seems to be a metaphorical body of water in which people are immersed with little awareness of their immersion.

Reading about the abstract and difficult-to-talk-about nature of organizational culture reminded me of the term “metanarrative” (McCallum & Stephens, 1998, p. 3). A metanarrative, McCallum and Stephens (1998) submitted, “is the implicit and usually invisible ideologies, systems, and assumptions which operate globally in a society to order knowledge and experience” (p. 3). McCallum and Stephens’s work focused on the power and influence of the metanarrative that looms behind many stories that are repeated to children through the generations. Stories are told and retold (within families and communities) with the effect of maintaining conformity to socially determined (and approved) patterns of behaviour, relationships, and interactions resulting in “cultural reproduction” (McCallum & Stephens, 1998, p. 4).

A variation on the term metanarrative was introduced to me by my dissertation supervisor as “grand narrative” (S. St. George, personal communication, May 21, 2010). My supervisor used the term grand narrative to describe our assumptions and overarching societal stories about what it means to be a good parent of a well-functioning family. I borrowed this concept of grand narrative to reflect on what it means in relationship to organizational stories and the creation and maintenance of organizational culture. Gergen and Gergen (2004) wrote that constructionist scholars have noted the way organizational cultures “are tied together by shared assumptions of the real and the good. Of major importance in bringing a culture together are their narratives. Especially crucial are those narratives that create a collective sense of history and destiny” (p. 53).

What makes grand narratives fascinating to me is their invisibility to those of us who are performing our respective roles within the narrative. We rarely notice the ongoing narrative or have awareness of its formation, let alone talk about it. In response to my question about how he might define

organizational culture, a graduate student (personal communication, February 3, 2011) whose master's thesis I supervised replied succinctly, "culture is what goes without saying because it comes without saying . . . it just 'is'."

Anderson-Wallace and Blanter (2005) explained that the term culture has its roots in the fields of sociology and anthropology and the main concepts shaping the term include an interest in the methods through which meaning is made in groups, often referred to as "systems of meaning" (p. 187). Anderson-Wallace and Blanter expanded by explaining that any group (a family, team, organization, or entire community) can be considered a society. Culture is "the way in which societies organize themselves in relation to these systems of meaning; and the specific distinctive techniques that evolve for maintaining, reinforcing, developing and changing things within and between societies" (p. 187).

After surveying the contemporary organizational culture literature, Anderson-Wallace and Blanter (2005) decided that two main perspectives were prevalent. Some researchers saw organizational culture as a critical variable of organizations, in short a component part (Anderson-Wallace & Blanter, 2005). Others saw culture as a "root metaphor" (Anderson-Wallace & Blanter, 2005, p. 188) for organizing—a frame through which to view all organizational life. Citing Scott et al.'s research, Anderson-Wallace and Blanter (2005) surmised that between 1951 and 2000 the studies conducted around organizational culture were primarily designed to help organizational leaders assess, analyze, and question the espoused values and underlying assumptions under which they operated. The research agenda that flowed from this stance focused on how to change an organization's culture in a way that would bring it into line with management's purposes. "Treating 'culture' as a variable or an 'integrating mechanism' in this way suggests that 'it' (note how culture becomes objectified) is susceptible to control and manipulation by management" (Anderson-Wallace & Blanter, 2005, p. 192). Anderson-Wallace and Blanter argued that organizational culture is not that simple: "organizations don't 'have' cultures—they are 'being' cultures" (p. 193).

Deal and Kennedy (2000) defined organizational culture simply as "the way things get done around here" (p. 4). Deal and Kennedy's definition prompts the question about how that way of doing things came into being. Where and when does organizational culture begin, and how is it created?

Schein (2004) explained that organizational culture is born of success. People within organizations respond as best they can to the problems encountered in accomplishing whatever it is that they set out to accomplish,

usually in response to internal demands and to the world external to their organization. When people within an organization coproduce successful outcomes, the way they reached those outcomes begins to define their culture because there is an underlying belief that if they do those same things again, in the same way, they will be successful again. People learn what is good and true and right within an organization based on their experiences of being successful. These experiences will “shape individuals’ normative beliefs and emotional understandings” (Anderson et al., 2006, p. 41) of how things should be done. Organizational culture, Schein (2004) wrote, is

a pattern of shared basic assumptions that was learned by a group as it solved its problems . . . [assumptions] that have worked well enough to be considered valid and, therefore, to be taught to new members as the correct way you perceive, think, and feel in relation to those problems. (p. 17)

This explanation of culture creation seemed logical to me—if I solved a problem successfully once and a similar problem pops up again, it makes sense to repeat what worked last time around and to repeat that every time a similar challenge appears. It is repetition and patterns that seem to shape culture.

Patterns and repeated interactions among people have “template-like effects” (Blantern & Anderson-Wallace, 2006, p. 70). Blantern and Anderson-Wallace are, like me, pracademics who work and write at the intersection of their own organizational development practice and academic inquiry. Through case studies with their own clients, Blantern and Anderson-Wallace (2006),

employ quite an extensive “tool set” based largely on qualitative and participative inquiry techniques. . . . In addition, [they] have designed a number of web-based tools for exploring priorities, decision-making and systemic project management and review, and in recent years have also begun to use multi-media applications (digital imaging, film, and video) to promote inquiry and reflection in the various phases of inquiry, imagination, resolution and review. (pp. 20–21)

In their research into organizational culture, Blantern and Anderson-Wallace (2006) were intrigued by “patterns, and *their* behaviour, especially when it comes to how things stay the same or change. We are talking about encounters between people, not of the behaviour of individuals” (p. 70). Blantern and Anderson-Wallace referred to these patterns between and among people that exist in every organization as “architectures people use to frame and perform their experience” (p. 75). These patterns shape and influence the way objects and technology are used, the way people move, the décor and style

of dress within an organization, the spaces occupied, power relations, politeness norms, who is allowed to talk with whom—and these patterns get locked into place through repetition. “The pattern becomes an actor, or even a ‘director,’ contributing to the re-inscription or reproduction of meaning and possible co-operated action” (Blanter & Anderson-Wallace, 2006, p. 77). The idea of pattern-as-director makes it easy for me to understand how quickly Deal and Kennedy’s (2000) suggestion that culture is the way we do things around here is rapidly conjured into existence with very little (if any) awareness from the players involved in the act of coconjuring.

These patterns of relating are cocreated and accepted by the players involved, and soon there does not seem to be any choice in doing things differently (Hosking & McNamee, 2006). It may seem as if there is indeed a script in place, and the possibility of improvising and experimenting does not exist because the organizational culture implies rules and guidelines that are set and solid. To do or say something differently is seen as wrong or bad or crazy. “The mutual acceptance of story lines has an important conservative effect upon encounters. Once the person initially presents a line, he and the others build their later responses upon it, and in a sense become stuck with it” (Blanter & Anderson-Wallace, 2006, p. 76). Even when a change in the established pattern seems desirable, Blanter and Anderson-Wallace (2006) argued that it is extraordinarily difficult to create a shift in the embedded culture: “So we get ready and this very pre-preparedness, like the tennis player waiting to receive serve, takes us, and the other party, back in the dance we do not know how *not* to do together” (p. 76).

I was fascinated by Blanter and Anderson-Wallace’s (2006) description of the power that these patterns of relating maintain over members of the organization (without their awareness) “and which much of the time seem to lie beyond our control” (p. 76). We endow these patterns power over us, and our organizational cultures become steeped in unspoken (and often unwritten) codes of conduct. Blanter and Anderson-Wallace (2006) observed, “In practice when we are in full flow—we do not stop to think about them as codes or ‘traffic rules of interaction’” (p. 82).

I have always been intrigued by my clients’ observations that organizational culture is invisible to them until they leave their organization to join a different one. All of a sudden, the different ways of doing things around the new organization make the old culture clearly visible. One might guess, therefore, that a newcomer to an organization might stand a strong chance of creating shifts in the newly encountered organizational culture because he or

she can actually notice the unfamiliar patterns. Not so, argued Edgar Schein (2009). Although a newcomer may see these patterns, he or she is taught quickly (not always explicitly or formally) how to behave within the culture in order to fit in and be successful. Schein (2009) suggested that there exists a cultural principle that relationships played out within organizations are to a large degree “based on scripted roles . . . which become so automatic that we are often not even conscious of them. We must play our roles appropriately, and these roles must mesh in accordance with the given situation” (p. 11). One of my clients whispered to me in the middle of a meeting that her organization put the word cult in culture and that anyone who did not want to adapt to the organizational culture was told to FIFO. I asked what that acronym meant, which resulted in the answer, “It’s our quick way of saying, ‘fit in or fuck off’” (Client, personal communication, October 4, 2010).

Organizational culture becomes a rather daunting and confusing phenomenon, especially if one is asked how to go about changing that culture. This is a common request in my line of work, and the request usually involves the question, how do we develop leadership in order to shift our organizational culture? Barker (1997) suggested that “leadership has been advocated as a solution to particular personal, social and organizational problems. The problem is that the problems to be solved have not been well defined” (p. 345). If culture is underpinned by hard-to-define underlying assumptions that lead to strongly embedded, repeated patterns, how do we begin playing with and inviting new and different performances of these well-established patterns? Bate (as cited in Anderson-Wallace & Blanton, 2005) reported that while working with organizational culture issues they are “constantly reminded of the Chinese saying that the more you know the more confused you become” (p. 188).

Peter Block (2002) explained our human tendency to avoid disrupting the established organizational patterns. Block noted, “We live in a culture that lavishes all its rewards on ‘what works’ . . . because this captures our love of practicality and our attraction to what is concrete and measurable” (p. 3). Block argued,

We find ourselves giving in to our doubts, and settling for what we know how to do, or can soon learn how to do, instead of pursuing what most matters to us and living with the adventure and anxiety that this requires. (p. 1)

The strength and tenacity of organizational culture derives in part from this anxiety reduction function because once a group of people share assumptions,

the resulting automatic patterns of thinking, feeling, and taking action provide them with meaning, stability, predictability and comfort (Schein, 2009).

It is at this point that I turn to an exploration of how one might begin relating with organizational culture if one sees room for improvement in the predominant patterns of interaction. I have noted the tendency for many clients to seek leadership development programs in order to create a more positive organizational culture. These clients are often in a formally designated managerial or leadership position within the hierarchy. They are the bosses, so to speak, and they believe that they are responsible for shifting the organizational culture. Their assumption comes, Koivunen (2006) proposed, from the prevailing leadership literature that defines a leader as, “A knowing individual who is understood as a separate, private entity . . . the active subject who has the necessary knowledge and wisdom to influence” (p. 92).

When invited to articulate what it is my clients want, a common response is that they want to help shift their culture—because, to refer again to Deal and Kennedy’s (2000) well-used phrase, the way things are done around here is no longer acceptable. When pushed to explain what, precisely, is no longer acceptable about their organizational culture, a common complaint is that morale is down, people are not happy and engaged in the work they are doing, the overall culture has turned negative and many are complaining, and that certain people have become difficult, problem employees.

The tendency that I have noticed is to blame specific individuals for an unacceptable organizational culture. Blanter and Anderson-Wallace (2006) wrote, “People have no qualities outside interactions and the forms that occasion them” (p. 85). To label individuals as problems takes the scapegoat approach to individualizing what is, from a relational stance, a more complex, socially constructed, systemic issue. Bushe (2001) suggested, “The essence of social reality is always cocreated. Everyone involved contributes to the creation, maintenance, and change of the reality or truths they face at work” (p. 11). Blanter and Anderson-Wallace (2006) proposed that if people find themselves part of an organizational culture that feels negative and dysfunctional, that culture is being relationally and mutually enacted by many. All involved, from Blanter and Anderson-Wallace’s perspective, are doing something called out by, and related to, the form of interchange in which they are mutually engaged. “If we are interested in changing what we make happen in communities and organizations, we believe it is promising to give attention to the patterns of encounter—rather than (so called) ‘deficiencies’ in individuals” (Blanter & Anderson-Wallace, 2006, p. 78).

Paying attention to the patterns of encounter becomes more complicated and uncomfortable to perform when one acknowledges the history and tradition of hierarchical organizations that have typically been ruled in a command and control manner, from the top down. Within these organizations, people at the bottom levels of the hierarchy often believe that they will get in trouble, be punished (or fired) if they try to perform differently by breaking up well-established patterns—there is an assumption in place that those at the top have very real power over them. Social constructionist scholars, such as Gergen (2009), Hosking and McNamee (2006), and Shotter (2002), proposed that “a central premise of social constructionism is that social realities are social achievements produced by people co-ordinating their activities” (Hosking & McNamee, 2006, p. 25). If we find ourselves in the midst of a hierarchy in which people have power over others, it is because we have by the nature of our ways of relating created that power. Blanton and Anderson-Wallace (2006) explored how power relations are brought into being with questions such as “what could they do to me” (p. 74), whose territory are we on, and what face should I present?

Hosking and McNamee (2006) argued, “Although the matter of power or authority is ever present . . . one person alone cannot control either how relating will go on (e.g. through dominance or dialogue) or control the ‘outcomes(s)’—the social realities produced” (p. 26). Hosking and McNamee proposed that even when there are struggles and challenges within a hierarchical organization, “If constructions are a byproduct of relational engagement (conversation and performance), then we are free to pause and ask ourselves how else we might engage, in what other ways might we talk about this topic, issue, or problem” (p. 31)? Hierarchy does not need to be the enemy of open, transformative conversations according to relational scholars (Anderson et al., 2006; Gergen, 2009; Hosking & McNamee, 2006).

Anderson et al. (2006) recognized the need in many organizations for hierarchical structures: “All people cannot contribute to all decisions, and integrative or overview positions may often be essential. Yet, we need not equate hierarchy with the old fashioned view of top down authority” (pp. 21–22). When designated managers or formal leaders can shift their stance from “directing others’ performances from above to performing *with* them” (Anderson et al., 2006, p. 22) there is a shift from separate individuals getting other separate individuals to do what they want them to get done to “inviting them into conversations and actions that produce coordinated achievement” (p. 22). This is an invitation to participate in the unfolding of organizational

life with a completely different mindset than the hero-on-a-white-horse approach that implied that an organizational participant must do what he or she is told to do by whomever holds the more powerful position. Caroline Ramsey's (2006) poem, "The Agent Out There," vividly illustrates the anxiety and tension that is created by this individualistic approach to organizational culture difficulties:

There's an agent out there somewhere
With a mission to control
A James Bond figure,
 With sleeves rolled up
 And a saviour's plan.

And all the others in the room
Await his words in wary silence,
For his eyes have analysed our world
 And mapped our future routes.
For his insights ascribe to everyone
 The steps that we should take.

Yes, there's an agent out there somewhere
With a mission to control

He's matched
 Action to worlds
 And offers to needs
He's measured
 Who we might be
 And what we can do
He's moved
 Mountains to molehills
 And cynics to tears

Yes, there's an agent right out there

With a mission to control.

“But where is he?

He should be here by now!

He said by ten-fifteen

That’s half an hour ago!”

Ten minutes later, he’s arrived:

His car broke down;

The mechanic didn’t care

His mobile’s charge has been run down,

He didn’t have the fare

For a taxicab or metro bus

And then to make things worse

His secretary mistook the time

For the meeting, hence the rush.

He’s that agent out there in here

With a mission to control? (pp. 52–53)

The traditional belief that an individual leader can take control, use his or her influence, and turn things around has run its course in my opinion. No single person, despite how talented, wise, or experienced, can single handedly inspire big changes within an organization. A person can, however, invite conversations and dialogue that might begin to crack open possibilities for transformation as people collaborate to cocreate a new future. These possibilities will open up in relationship through conversation; they will not be produced singlehandedly by an extraordinary individual.

It is the importance of talking about things and inviting conversations among all involved in a situation that intrigues me about a social constructionist stance. Ken Blanchard, in the foreword to Susan Scott’s (2004) *Fierce Conversations* summarized the essence of the book: “While no single conversation is guaranteed to change the trajectory of a career, a business, a marriage, or a life, any single conversation can. The conversation is the relationship” (pp. xiii–xiv). These conversations, these relationships, never become solidly defined for eternity. They are always in the process of becoming, consistently fluid. “Sustaining vitality within an organization

requires continuous conversation” (Anderson et al., 2006, p. 13). What makes perfect sense on Monday morning may seem ludicrous on Tuesday afternoon once new information or new participants enter the conversation. Anderson et al. (2006) reminded readers, “The firm, final and fabulous conclusions of today often become tomorrow’s curios. Conclusions and commitments are necessary, but these must be understood in terms of the conversational condition of the time” (p. 12).

As we look at possibilities for playing and working with organizational cultures through a constructionist lens, Barge and Oliver (2003) proposed that such a lens alters our perspective “of conversation as primarily being about transmitting information among organizational members to a view of conversation as a powerful force that shapes the texture of organizational life” (p. 1). Instead of people in higher positions of the hierarchy telling people how to behave and trying to control and manipulate engagement levels and culturally reinforced patterns, “conversations shape the form of rationality, the type of power relationships, the identities of individuals and collectivities, and the types of emotions that are experienced by organizational members” (Barge & Oliver, 2003, p. 1).

Nowhere have relational scholars suggested that these important conversations are comfortable, agreeable, or will necessarily end in harmony and consensus (Barge & Oliver, 2003; Gergen, 2009; Hosking & McNamee, 2006). “This positioning of self and other in the conversation lends itself to a commitment of attempting to make sense of the muddle, difficult patterns, confusions, trouble in communicating” (Barge & Oliver, 2003, p. 1).

Blantern and Anderson-Wallace (2006) acknowledged that formal hierarchies with a tradition of power differences make direct, open conversations less comfortable. Blantern and Anderson-Wallace used the term “politeness codes” (p. 80) to describe the awkwardness of speaking up directly to people in perceived power positions: “Politeness codes embed power-relations in transactions, and they also serve to collapse the possibility of making available the variety of person-meanings that arise and are active” (p. 80). The muddle is more likely to stay muddled when power relationships are firmly entrenched and fewer perspectives are invited to the surface for exploration.

Blantern and Anderson-Wallace (2006) proposed, “It is easier to be direct where the context is informal” (p. 80). Blantern and Anderson-Wallace suggested that the more formal the situation, the more polite and indirect we are expected to be, and the less likely we are to share our most honest thoughts

and feelings. Their observation leads me to think about the influence that our upbringing, family of origin experiences, schooling, gender, faith, the generation in which we grew up (and many more influencing elements) have on our comfort level around speaking directly with others.

We might say then that our cooperation in the notion of politeness in any given situation is inscribed, like a cultural algorithm with the accumulated historical practice of what situated forms of interchange are “supposed to be like” in any community along with the position and parts we expect of each other. (Blanter & Anderson-Wallace, 2006, p. 80)

Christine Oliver (2010) wrote about the way that conversations “make” (para. 8) the situation (professional or personal) in which we find ourselves: “The word making is used deliberately here to foreground how for social constructionism, communication is a process of participating in and building realities” (para. 5). Oliver’s proposition holds exciting possibilities for any person who can see him or herself as a participant in building a new reality. Despite the seemingly potent influence of power relationships, if I see myself as a participant in whatever is unfolding around me, it increases the likelihood that I will at least make an effort to contribute and possibly effect change.

According to Oliver’s (2010) perspective, someone who wants to make a positive difference in a family, team, organization, or community and is a participant in the unfolding conversations around me is neither completely powerful nor completely powerless—no matter what his or her official title or place in the hierarchy. “The individual is treated as neither omnipotent nor impotent in shaping the opportunities and constraints that we call life” (para. 5). Oliver’s point-of-view touched me. People with huge amounts of positional power sometimes fail to create change no matter how hard they try. On the other hand, people with relatively little positional power (Rosa Parks would be one lovely historical example) sometimes help shake up entire movements. Oliver (2010) stated,

The individual is seen as a force with powers to shape, with others . . . this is not to say that we all have equal abilities to make flexible and free choices. It is to say that we must take seriously that the way we talk and listen has consequences for self and others. (para. 8)

This is why, for me, a relational approach to organizational culture holds exciting promise—promises for new futures and ways of doing things around here, but not promises for a neat, tidy, predictable reality. “The

complexity of reality is underlined,” wrote Oliver (2010), and “this is not an approach that thinks or acts in terms of simple cause and effect” (para. 6).

When exploring possibilities for change within organizational cultures, what would a relational practitioner consider? If, as Anderson-Wallace and Blanter (2005) argued, we shift our understanding to culture being the context for all organizational activity, then “cultures are thus synonymous with organizations” (p. 193). As a consequence, Anderson-Wallace and Blanter wrote, “Any strategy for managing cultural (and thus organizational) development involves not the application of specific ‘tools’ or ‘methods’. . . ‘cultural’ change is what takes place among and between people in the ‘patterns, connections, and interpretations’” (p. 194). By accepting the intimate relationship between culture and change, “both are viewed as created, recreated and reinforced in the prosaic, day-to-day networks of conversations and interactions among people” (Anderson-Wallace & Blanter, 2005, p. 194).

From this perspective, culture change is seen as a “constant, dynamic negotiation created in collectives having dialogue about shared tasks . . . where real issues are at stake, where there are real risks, real issues of power and real decisions to be made” (Anderson-Wallace & Blanter, 2005, p. 194). This is why, Ramsey (2006) proposed, “The work of the researcher, manager, or professional in any field is therefore always incomplete, always accepting other ways of ‘knowing’” (p. 19).

Hosking and McNamee (2006) contended that this relational approach to supporting and participating in organizational culture change is less focused on the “proper or best way” (p. 30) and is more interested in the many varied ways that social shifts can happen. Hosking and McNamee argued that “our focus is on the immediate moment—the ongoing relational processes—and the wide array of voices, relations, communities, and experiences that are mobilized in those processes” (p. 30). This wide array of voices takes something away from what an individual leader might do to influence and shift culture.

How might a formally designated leader make choices that increase the likelihood of cultural patterns shifting? Hosking (2006) hypothesized that “when people are treated as ‘things’ and assumed to be separated from other things there are implications for how relations are understood” (p. 54). If leaders are understood to be separate individuals, completely independent of their peers and their bosses and their followers, we begin to think about them as subjects who act upon receiving objects: “the subject is the one who acts to know and to influence ‘other’ as a knowable and formable object” (Hosking,

2006, p. 55). Hosking posited that when relational processes are centred in organizations, the “realities” (p. 57), which include the ongoing relationships, decision-making processes, the morale and organizational culture, are “described as constructed and reconstructed in those processes” (p. 57). These ongoing, fluid, always-in-the-middle-of-becoming processes construct “markets, management, hierarchy, all social realities . . . and what is good and bad. Further, these realities are multiple and local rather than singular and transcendent” (Hosking, 2006, p. 60).

Exploring organizational culture as relational processes does not guarantee easy choices or clear paths forward; it may actually create the opposite in revealing the multiple stories that coexist with organizations. My experience tells me that many formal leaders are afraid to open up multiple stories; they long to keep things simple. This is why, I think, a tendency toward the individualistic paradigm is seductive for many formal leaders who might find it more comfortable to believe that if they can simply get rid of the negative people, everything will be just fine.

Hosking and McNamee (2006) described Boje’s work in analyzing the Walt Disney Enterprises through deconstructive analysis: “looking at cacophony and discord rather than ‘the managed harmony of the official story’ . . . showing organizational culture as fragmented and conflicted . . . a site of multiple meanings engaged in a constant struggle for control” (p. 150). In my experience, few leaders find it easy to step into this cultural messiness. It feels more comfortable to try and safely plan and control the steps forward.

It is this messiness of multiple meanings, the fragmented chaos of organizational life, that fascinates me. I appreciate why so many organizational members long to coordinate and control change, especially when they look at their organizational culture from a place of perceived positional power. I understand the temptation to turn to research that attempts to explain, once and for all, how to move forward in a predictably effective and efficient manner. Research conducted from a positivist stance implies: “The phenomena are known and fixed, and the task now is to proceed with the categorizing and the counting” (Vaill, 1998, p. 28). If only it were that simple.

Vaill (1998) resisted the notion of fixed, prescriptive methods for creating change within an organization and wrote about organizational culture processes as necessarily multidirectional and multidisciplinary with “an absence of an impulse to limit, close off, to categorize fixedly . . . locating awareness in the relationality of human beings to the people and things around them” (p. 28). With a relational approach to shifting organizational culture,

one must be prepared to question and explore how leaders and managers are perceived within the organization, what it means to perform those roles, and the patterns and power relationships that are embedded. Addleson (2006) wrote, “Management and leadership take on different meanings” (p. 202) if organizational members are open to innovative conversations and shared responsibility and if people are willing to let go of the notion that if good things are going to happen, it is leaders and managers who must make those things happen. Those formal management roles and how they are performed “are related to social context, framed by social norms, and exercised by consent rather than being titles that individuals possess by virtue of their formal positions on an organizational chart or their individual abilities” (Addleson, 2006, p. 202).

Leadership and leadership development take on a whole new meaning when we look at the complexity of organizational life through a social constructionist and relational lens. When I relate a social constructionist stance towards organizational culture back to my interest in improvisational principles, I think that organizational members (formally designated leaders and non-formal-leaders) have a lot to learn from improvisers. As Holzman (2006) pointed out, “We tend to repeat our well-learned patterns and passively play out the roles we have already learned” (p. 261). The greatest difficulty in beginning to shift organizational culture is creating opportunities that invite people “to take different kinds of risks from the ones they are used to, namely the risk to perform in new ways so they can discover for themselves the changes that are possible to create” (Holzman, 2006, p. 267). Kat Koppett (2001) in *Training to Imagine* wrote that for improvisers to accomplish their potentially daunting task—creating entertaining stories on the spot, collaboratively—they must be willing to trust and depend on their fellow performers in order to cocreate a compelling performance. No single actor is the leader. No individual performer will make or break the performance—the ensemble is in it together:

Faithfulness to the moment and to the present circumstances entails continuous surrender. Perhaps we are surrendering to something delightful, but we still have to give up our expectations and a certain degree of control—give up being safely wrapped in our own story. We still engage in the important practice of planning and scheduling—not to rigidly lock in the future, but to tune up the self. (Koppett, 2001, p. 21)

Perhaps, change-making leadership development initiatives are experiences during which participants (no matter what role they play within their organization or where they fall in the hierarchy) can experiment with letting go of being safely wrapped in their own individual stories. By continuously surrendering a sense of individual control and opening up possibilities for how a new way of doing things might be collaboratively created, organizational members become cocreators of new patterns—a new culture. As Anderson-Wallace and Blanter (2005) proposed,

The relational approach then is offered as an alternative vocabulary for thinking and practice, promoting the idea of redefining and redesigning organizational life. Thus, culture can be tackled by giving attention to *doing things differently with others*, trying new things and developing new lived experiences together around real everyday tasks. It is by no means *the answer* but perhaps it does offer (at least to us as jobbing consultants!) some practical promise for change and difference in these complex times. (pp. 203–204)

Leadership development. The introduction to this section of the literature review follows a familiar pattern. I will attempt to define what the title of this section means to me, and I will turn first to a dictionary definition. My interpretation of the word leadership was offered, at great length, in the opening section of this chapter. Development is defined as, “The act or process of developing; growth; progress” (“Development,” 2011, para. 4).

My professional practice is dedicated to leadership development, so the meaning behind the phrase holds personal importance to me—it is my livelihood. In this piece of writing, however, the primary goal in defining the phrase leadership development and surveying current research was to enrich my understanding of the context for this project. I needed to locate myself in relationship to the phrase to set the stage effectively for the research story that follows.

In surveying the literature I discovered that very little leadership development (emphasis on the word development) research was easily found. Dvir, Eden, Avolio, and Shamir (2002) reported that given the billions of dollars invested annually in leadership development, very little has been done to evaluate the impact of this investment. Jackson and Parry (2008) pointed out, “Much of what has been written has been generated by trainers or consultants who often have a vested interest in promoting their particular leadership programme or intervention” (p. 119). My own research initiative is evidence that Jackson and Parry’s assertion is valid—I too turned to one of my

own initiatives as the base for this research and, as was explained in the introductory chapter, this was a natural choice for me. Jackson and Parry (2008) explained why this trend is so evident:

Of course, the more astute leadership researchers have endeavoured to exploit potential synergies between research and development activities. Leadership development activities create opportunities to engage with leaders who are participating in their programmes. These leaders help to research questions, research priorities and act as sources of data. (p. 114)

According to Jackson and Parry (2008), the research that does exist “has by no means been definitive in its evaluation of the effectiveness of leadership development. Moreover, it has not been able to isolate what types of leadership development are most effective” (p. 119). The most common research is conducted quantitatively immediately after completion of a leadership development initiative by surveying the participants. Jackson and Parry argued, “Researchers have long highlighted the need for more empirical studies that examine managerial leadership development but still these calls have remained largely unheeded” (p. 119). I was not certain that this research initiative would contribute to greater clarity in the field, yet I was eager to proceed.

Graham Mole (2004) submitted, “The leadership training and development industry is big business. It is also an expanding business fuelled by a phenomenal growth in the demand for and the supply of leadership training and development programmes” (p. 125). From my own business experience over the past 10 years, I believe Mole’s assertion to have validity. Jackson and Parry (2008) explained that organizational resources have traditionally been aimed at leadership development, as opposed to leadership development research: “The need to develop leadership talent is an urgent matter which requires immediate attention. Research can wait for another day. Besides, it’s hard to see the benefits of research. Development activities are so much more visible and action-oriented” (p. 113). My experience leads me to believe that Jackson and Parry’s assertion has merit. I have been surprised, and sometimes disappointed, by organizational leaders’ haste to design and deliver leadership development initiatives without slowing down long enough to consider the explicit objectives, the systemic support necessary to maximize value, and the criteria by which to eventually measure and assess the outcomes of the initiative. There is often a sense, from my perspective, that doing something—anything—quickly is more important than reflecting on what has

worked in the past, what has not worked, and studying systematically the possibilities of increasing leadership capacity.

To explain what leadership development means is impossible until one is clear on how one defines the kind of leadership that needs developing. The word development, and the variety of possible interpretations of what that phenomenon looks like in action, is worthy of its own exploration. In this section I will explore the challenges inherent in researching leadership development, the leadership development research surveyed within the literature, along with my observations about the kinds of studies that have been conducted, and why this area of research was intriguing, challenging, and at times frustrating for me.

First, I want to address this hybrid of intrigue, challenge, and frustration that I experienced while preparing to write this section of the literature review. The intrigue sprang from my growing awareness of how much I care about this topic. The more confusing and multilayered the topic of leadership development became, the keener I was to dive in to try and make sense of things in order to grow my own understanding of the inherent complexity. The challenge and frustration sprang from my realization that too few researchers have discerned for themselves (or the consumers of their research) what it is that they were attempting to study. Antonacopoulou and Bento (2004) posited, “The evolution of our thinking on how to develop leadership has paralleled the movement in theories of leadership” (p. 83).

What frustrated me most as I explored the leadership development literature was the common lack of acknowledgement of the evolutionary journey of the field and the lack of explanation for how researchers saw the context from which their research was conducted. Storey (2004) alleged confusing and mixed messages from his survey of the current leadership development literature: “The corpus of writing which is normally understood to constitute evolving or competing theories of leadership is in fact made up of studies, speculations and hypotheses about a variety of things . . . a bewildering mass of findings” (p. 12).

My bewilderment was fuelled by the following observations: the word development can look very different in action and it can include a wide variety of activities and initiatives; most leadership development continues to be focused on developing the skills and abilities of individual leaders; the leaders who participate in leadership development programs are usually formally designated managers who perform their roles from the higher levels of an organizational hierarchy; most leadership development research has been

conducted within the corporate sector (as opposed to the not-for-profit sector or public service); and, finally, the leadership development research that does exist suggested that the results are consistently difficult to articulate (Day, 2000; Grint, 2005; Jackson & Parry, 2008). I became even clearer about the importance of locating myself in this evolving journey, so that you can read this research story with awareness of how I have made meaning of the concepts related to the story's characters, plot, themes, and conclusions.

Boal and Hooijberg's (as cited in Antonacopoulou & Bento, 2004) suggested that fundamental changes in the way we perceive the phenomenon of leadership directly impact our efforts at developing it. A shift from an individualistic to a relational stance reflects

a wider socio-cognitive analysis of the complexity of leaders and leadership, as a process of meaning creation and construction of reality, which they and their followers jointly negotiate (Smircich and Morgan 1982; House and Aditya 1997). . . . The meanings vary with the multitude of conditions which shape the interrelationships between the diverse dynamic forces that define leadership in different contexts. (Antonacopoulou & Bento, 2004, pp. 83–85)

The individualist paradigm, explored at great length in earlier sections of this chapter, figured prominently again as I noticed the emphasis on leader development (as opposed to leadership development) within the current literature. Day (2000) described a leader development orientation as one focusing on developing the individual capabilities of leaders, and a leadership development orientation as one focusing on developing reciprocal relations and commitments. The blurring of language and a tendency to use leader and leadership synonymously, along with the word development, was glaringly obvious to me in the literature.

Tate (2004) indicated, "Leadership development activity has traditionally concentrated on the individual. It has shown less interest in the organization, either as customer or for building into the intervention design" (p. 293). Storey (2004) reported that researchers are "reluctant to let go of the idea of 'leaders' as inherently special people with unique qualities" (p. 17).

In their chapter titled "Methods of 'Learning Leadership': Taught and Experiential," Antonacopoulou and Bento (2004) began with two questions: "Can leadership be taught? Can leadership be learned" (p. 81)? Antonacopoulou and Bento answered their own question: "For many years the answer to both questions was presumed to be yes. In countless business school classrooms and executive development seminars, 'experts' delivered lectures

and presented examples that were supposed to ‘teach’ learners” (p. 81). This old pattern, “affectionately referred to as ‘sheep dipping’ in the trade” (Jackson & Parry, 2008, p. 117) was often delivered once or twice during a formally designated manager’s career. In traditional leadership development (which I argue should be renamed leader development) the focus of the programs was, and I believe still is, on the individual leader and his or her learning.

Scholars have questioned the wisdom of trying to develop leadership in the way that the main body of traditional and individualistic leadership training would have us believe possible (Mole, 2004; Storey, 2004; Vaill, 1998). Individualistic leader training, from Mole’s (2004) perspective, focused on teaching specific knowledge, skills, models, and universal templates. Mole’s (2004) harsh critique of these approaches argued that there are no known keys to leader success, “despite the ever-growing mountain of pulp and pointless training activity that is built on the misconception—and misrepresentation—that there are” (p. 135). Mole (2004) claimed that the problem of leadership development has become something of a fixation for many organizations:

To believe that it can be solved through the teaching of specious recipes is absurd. It is like suggesting that the problem of world hunger can be solved by the publication of more cookery books. Unless and until this is grasped, especially by those who are responsible for providing training in their organizations, we shall continue to get what we do *not* deserve. (Mole, 2004, p. 135)

One does not need to look far to discover that this individualistic, more traditional approach to leader development is alive and well. The promotional materials presented on many executive education websites (e.g., Wharton University of Pennsylvania, 2011) imply that no matter what one’s role is or in which organization one leads, investing large amounts of time (and money) in learning best practices, tools, skills, and methods will produce extraordinary leaders, guaranteeing extraordinary leadership that will lead to extraordinary organizational results (Mole, 2004). There is an overarching one-best-way philosophy that permeates the promotion of these programs with each of them suggesting that the schools providing these programs have figured out that one best way. These programs, along with their accompanying literature and materials, suggest to participants,

There may be just seven “habits” which need to be acquired, or “nine leadership keys to success” or as many as “21 irrefutable laws of leadership.” This formulaic approach to training and developing leaders, of teaching people leadership in the same way one might teach

geometry, is widely distributed and deeply embedded. (Mole, 2004, p. 125)

If you want to become a hero within your organization, the program descriptions seem to promise, come to our program and we will show you the way. Barker (1997) argued that “leadership training has become an industry, pandering to the egos of corporate executives by equipping them with the secret formulas for achieving saviorhood” (p. 347).

These individualistic programs, Vaill (1998) pointed out, are committed to teaching leaders the best old paradigm science about general cases and fixed and neutral universal principles that any leader worth his or her weight should know. Vaill asserted, “Leadership development is never about the general case . . . [because] it’s about specific people, specific issues, specific organizational cultures, and specific opportunities” (p. 19). Mole (2004) commented on the lack of contextualization with the programs: “The hallmark of leadership courses offered on the open market is their complete disregard for the organizational contexts in which their participants operate” (p. 125). The very best leadership development experiences, Vaill (1998) insisted, “touch leaders with their lookings rather than their findings” (p. 21). The emphasis on looking, as opposed to finding, hit a chord with me.

Leadership development can never be a matter of objectivist science, Vaill (1998) continued, because “it is a performing art—a dynamic, holistic phenomenon not easily or fruitfully broken into elements and lists of key factors” (p. 25). Vaill suggested that leadership development initiatives must create a safe, supportive environment in which participants can engage “in a process of discovery of the new, the unanticipated, and the unprecedented” (p. 25) rather than being expected to learn “the application of known laws to an already-explored territory” (p. 25).

It is Vaill’s (1998) contention that leadership development can never be a matter of objectivist science that created a lot of tension for me as I surveyed the literature. So much of the research I was reading, it seemed to me, had been conducted from an objectivist stance focusing on our old, individualistic paradigm. Jackson and Parry (2008) explained,

Virtually all the work on leadership development is conducted at the individual level of analysis. More specifically, it looks at how to increase levels of leadership skills within individual leaders. There is a major need for research into how to develop the processes of sharing leadership, either as co-leadership or in a more distributed form. (p. 120)

My bias towards a relational approach to leadership development and away from an individualistic approach will be no surprise to you. Based on my relational interpretation of the way leadership is performed among people up, down, and across an organizational hierarchy, I think that the goal of leadership development within any organization should be to increase and strengthen the capacity of the whole system to make sense of challenges, explore possible options for resolving those challenges, and to make commitments to cocreating ways to move forward together.

I agree with Drath's (2001) interpretation of what effective leadership development should do:

Leadership development in a community or organization, then, is the process of developing the capacity of the whole to make leadership happen for everyone, no matter how any individual person makes sense of leadership . . . leadership, in this view, is far from being something that a person can offer independently, simply as an individual, and is seen as a complex construction of multiple levels of meaning. (p. 155)

Drath (2001) argued, "This would not be done by simply training people in positions of authority" (p. 165). Hosking (as cited in Jackson & Parry, 2008) recommended that leadership development should not only include both leaders and followers, but it should also "actively blur the leader-follower divide, generate a collective understanding, and resist the temptation to impose top-down predefined models of leadership in favour of bottom-up locally generated content" (p. 122). Instead of focusing on those individuals holding formal positions of authority, Drath (2001) recommended that leadership development involve the entire system. Drath suggested,

Instead of seeking to develop leadership by developing individual leaders, this way of looking at leadership . . . helps us see how leadership can be developed as a systemic capacity: the capacity of a system to accomplish leadership tasks at various levels of complexity, bringing in increasing numbers of increasingly responsible people. (p. 165)

After surveying the literature, I could not find studies that examined a relational approach to leadership development as Drath (2001) had described. Instead, I discovered that leadership development studies focused primarily on formal leaders within organizations (Avolio, 2005; Day, 2000) or graduates of publicly offered executive education programs. Most organizations, according to surveys of the current research, offer leadership development opportunities to their formal leaders or to people perceived as being high potential

candidates for stepping into designated leadership roles within the organization (Paton, Taylor, & Storey, 2004). Jackson and Parry (2008) reported, “Almost all leadership development activities are aimed at those who occupy or are about to occupy formal leadership roles” (p. 121). Criticizing this trend, Jackson and Parry questioned, “If we recognize that leadership is co-produced, would it not make sense to extend leadership development activities to include followers as well as leaders” (p. 122)? No matter who is invited to participate or what sorts of activities make up the leadership development initiative, there is little documentation around the results that these programs are helping create (Day, 2000).

Organizations (in the both the public and private sectors) invest a lot of time, energy and resources designing, creating, and delivering a variety of leadership development initiatives. These initiatives may incorporate methods such as classroom programs, coaching and mentoring partnerships, the establishment of communities of practice, action learning projects tackled on the job, online courses, or outdoor experiential challenges (Mole, 2004; Tyler, 2004). I was fascinated by how little evaluation and assessment is published on the influence that these initiatives had on those involved.

Clarke, Butcher, and Bailey (2004) complained that “given the plethora of research and published material in the field of leadership, it is remarkable how little conceptual convergence is to be found” (p. 274). Clarke et al. blamed poor leadership development evaluation as playing a major role in their perceived lack of convergence:

Surveys repeatedly report inadequate assessment of development activities. Lack of clear objectives and the difficulty of establishing quantifiable results have been cited as significant reasons for this shortfall (Cairns 1997) . . . in an Institute of Management Development (IMD) study, only 27 per cent of organizations evaluated open programmes and half of those evaluations focused on immediate post-programme effects. Only 6 per cent evaluated programme effectiveness one year later . . . these kinds of studies draw attention to the questionable application of evaluation criteria, with the inevitability of inappropriate evaluation processes leading to unusable results. (pp. 273–274)

Sheila Tyler (2004) claimed, “Organizations embark on leadership and management development programmes on the assumption that they will have a beneficial impact at one or more levels, from improvements in individual performance to change in the organization itself” (p. 152). Ideally, once they

sponsor or design and implement such a program, Tyler reported, they evaluate it and, “typically, the most desirable question is deemed to be: ‘What is the impact?’” (p. 152)? This question, it turns out, is a difficult one to answer. Ron Cacioppe (1998) proposed,

Little thorough evaluation and assessment of the outcomes, competencies, and behavioural changes is done. This is often considered too time consuming, or costly, so course satisfaction, personal feedback and the feel of the human resources people and managers about the program are often the major evaluation processes. (p. 47)

In describing the evaluation of a leadership development program for senior leaders in a large engineering company, Paton et al. (2004) reported that the results were difficult to articulate. The underlying issue in trying to assess the effectiveness of any program, Paton et al. contended, concerns “whether and how far leadership development is a process that can be rationalized and institutionalized” (p. 122) in a reliable fashion. In describing the findings of a study designed to assess the impact of a newly introduced leadership program, Paton et al. concluded,

For some people it has huge impacts, for some people it doesn’t. When it was designed it was quite risky. It’s not a “tools and techniques” course—though there are some business-type inputs, so you’ve got some tangible parts. It’s a programme that’s been a bit of an investment of faith over the years. It’s hard to measure. (p. 122)

The idea of an investment in faith surfaces often in the literature. Hungry for measurable evidence that leadership development adds value (or not) and makes a positive difference (or not), researchers have attempted to conduct quantitative studies that will surface data that will lead to clearer findings (Antonacopoulou & Bento, 2004). Clear findings, it appears, have not been forthcoming.

Despite great interest in measuring leadership development program impact, the difficulties facing researchers are vast. Dexter and Prince (2007) reported that more than 34 billion pounds is spent around the world annually on leadership development and “whether and how to measure such returns on investments is subject to debate” (p. 611). Antonacopoulou and Bento (2004) stated, “It is not hard to see that the traditional mode of researching and developing leadership is driven by an economic logic which sees learning and development as a means of improving financial performance” (p. 89). Dexter and Prince (2007) reported that sponsors of leadership development research

are eager to know if their investment is making a positive difference to their financial bottom line and shareholder value. Due to the fact my research took place within the public sector, financial metrics were not easily applicable.

Another of the key factors complicating research in this area is recognition that it is impossible to attribute organizational changes conclusively to a leadership development program as there are so many other initiatives running alongside the program, and many other elements that simultaneously influence the organization's performance (Cacioppe, 1998). The Council for Excellence in Management and Leadership (as cited in Dexter & Prince, 2007) "suggested there are no credible measures to provide links between the supply of management training and development and better business management and improved performance" (p. 610). Dexter and Prince's (2007) case study, however, stated that despite the difficulty in evaluating the impact of management development programs, their research results "indicate that there are identifiable benefits to the participants, their team, Derby City Council, and other stakeholders" (p. 610). This particular study intrigued me, primarily because it was conducted within the public sector. Dexter and Prince (2007) explained that "literature on the transfer of learning to the workplace, knowledge management, and learning organizations have mainly focused on the private sector" (p. 613). I realized that I too would be interested in the identifiable benefits to the leadership program participants with whom I would be interacting—I wanted to know what they had gained, and what value they had taken away from their experience within the program.

David Guest's (as cited in Storey, 2004) critique of leadership development literature warned that much of it is "right enough to be dangerously wrong" (p. 31). This is what I wanted to avoid within this dissertation—the insinuation that I would perhaps find clues to the right, good, and proper way to conduct leadership development within a large organization. There can never be a clear definition of what good leadership development looks like, since "such definitions arise not from organizational requirements (which are themselves the product of the people in power's theories and belief systems of organization), but from the shifting ways in which over time these functions are variously conceptualized" (Storey, 2004, p. 31). What is perceived as exceptional leadership development is a product of history and those perceptions will shift, depending on the context, the timing, and those who are formulating the perceptions. Salaman (2004) suggested wariness when certain theories and approaches "seem obvious and overwhelming—supported by the weight of airport bookstall analysis, media insistence and business

school courses—the obviousness and dominance of such definitions should warn us of their precariousness” (p. 58).

I think that leadership development is precarious. I think that depending on the organization, the people involved, the challenges and opportunities facing them, the resources available, the traditions and history in which the organization is embedded (among many other situational elements) leadership development is a complex enterprise. I aimed to explore the influences of leadership development viewed as a relational practice (Bouwen & Hovelynck, 2006). A relational practice, according to Bouwen and Hovelynck, is:

Any interaction among actors with the following characteristics: joint ownership of the task, mutual acknowledgement of each other’s position and contribution, mutually testable and illustrated statements, exchange of energy and joint excitement, open possibility for questioning and confrontation. (p. 134)

A relational approach to leadership development aims to create a shift from an assumption that individuals who are given positional power are solely responsible for creating successful outcomes. The facilitation of relational leadership development, Bouwen and Hovelynck (2006) proposed, “cannot be of an explaining or demanding type; it can be just opening up and inviting for inquiry from within” (p. 135). A relational approach will hopefully initiate a transition from “a detached or disengaged form of talking to a participatory way of acting” (Bouwen & Hovelynck, 2006, p. 135).

This is what my clients seek when they ask me to support them in developing leadership within their organizations—they want engaged, participative people working collaboratively to provide exemplary service. The program around which this research project is designed set out to do just that.

Conclusion

Hosking and McNamee (2006) ended the preface to their book: “We have written no concluding chapter. There is no conclusion other than there is no conclusion” (p. 11). I can only imagine some of my clients’ responses to that excerpt, for many of them long for neat and tidy conclusions that will help them move forward on their respective leadership development journeys with more confidence. This review(er) of the literature ends with no conclusion, other than to suggest that there are no “best practices” (Ramsey, 2006, p. 17) when it comes to leadership development within large organizations.

Quoting Ramsey's (2006) resistance to such notions of best practices, "Quite apart from having problems with the implicit epistemology of such efforts; I find that organizations are far too complex and messy for these attempts to be successful" (p. 17). Although Ramsey used poetry to explore leadership development concepts (and I could not write a poem if my life depended on it), I am drawn to her reasons why poetry works for her: "I have found that poetry foregrounds relationship, invitation, maybes and wondering. I don't think that these are unhelpful companions in learning and development" (Ramsey, 2006, p. 20)!

The research around the leadership program I focused on was special to me for many reasons: it was made up of organizational members from all levels of the hierarchy, it spanned 18 months and gave participants a chance to practice and reflect on their learning, participants were able to reconnect with each other and continue strengthening their relationships, I could talk with program participants who graduated 8 years ago to those who graduated recently, I could explore how the program experience influenced participants as individuals and how leadership was showing up relationally within their personal and professional lives, and I was able to immediately apply what I was learning through the research to my own leadership development practice.

My hope is that my interpretation of the literature has served just as a poem might have. I hope that this chapter invites wonder about what lies ahead and curiosity regarding my choice of methodology and methods for investigating the influences that a leadership development program had on its participants.

Chapter Three: Research Approach, Methodology, and Methods

How I Began

People asked me, “What motivated you to take on this PhD program and this research project?” My first answer was, “This leadership program has had an influence on my development and my work, and I wanted to understand what influence it is having on the lives of its participants.” My second answer was, “curiosity.” I find it energizing to pick a question that I do not know the answer to and set out to look for possible answers. In his book, *Good to Great*, Jim Collins (2001) compared good research to climbing into a boat: “Like Lewis and Clark, and head west, saying, ‘We don’t know what we’ll find when we get there, but we’ll be sure to let you know when we get back’” (p. 5).

For me, socially responsible research blends curiosity and a desire to contribute to a certain community, with rigour. It combines a sense of not knowing with an eagerness to understand more fully what lies out there and to attempt to explore in a way that benefits both the question asker and the question answerers. Socially responsible research, in my view, leaves all involved feeling stronger and better prepared to continue moving forward together. I also think that a socially responsible explorer or researcher makes a commitment after engaging in the exploration, to tell the story clearly, in a way that honours all of those involved in the exploratory journey and shares the lessons learned with those not directly involved in the adventure.

I explain what I decided and why, as I climbed into Jim Collins’s (2001) metaphorical research boat. To help make sense of the findings and theorizing presented in the next chapter, I describe design and procedural decisions, the rationale behind those choices, as well as analytical processes. I also outline my decisions about choosing a social constructionist stance, specific methods for gathering and analyzing data, participant recruitment and sampling, and the ethical issues that needed to be considered throughout the research process. The actual findings and results of the analytic processes are presented in the next chapter; this is the story of how I conducted the research.

Staying with Collins’s (2001) explorers-setting-off-in-a-boat metaphor, Collins’s use of the word, we, was especially appropriate to this study. I did not paddle alone. The research journey involved participants as coresearchers. I wanted to hear as many voices as possible in response to the research question, and I hoped to strengthen and nurture the relationships and sense of community among participants of the Leadership Development Program. I hoped that the organization would stretch and benefit from the inquiry process.

As Dutton and Dukerich (2006) noted in their journal article about the under-appreciated dimension of the relational foundation of interesting research,

We see the relational foundation of research as a feeder and enabler of the overall quality of a research project . . . that build[s] or diminish[es] the quality of connections between the people involved as pivotal for building a healthy, enriching, and generative research project. (p. 26)

In their introduction to *Relational Perspectives in Organizational Studies*, Kyriakidou and Özbilgin (2006) underlined a fundamental philosophical choice faced by organizational theorists: “whether to conceive of the social world as consisting in substances or processes, in static ‘things’ or in dynamic, unfolding relations” (p. 1). I chose the latter, and that choice will be explained as this chapter unfolds.

In their article, “Contextualizing Methods Choice in Organizational Research,” Buchanan and Bryman (2007) contended that researchers often take methodology out of context and that the choice of methods tends to be presented as one simple step in the research process between setting objectives and commencing data collection. Buchanan and Bryman’s article explained how choice of stance, methodology, and methods are influenced “not only by research goals, norms of practice, and epistemological concerns but also by a combination of organizational, historical, political, ethical, evidential, and personally significant characteristics of the field of research” (p. 483).

The research design and procedural decisions are supported by literature from three perspectives: social constructionist ideas and how those ideas influence research choices, leadership theory, and methodological theory and considerations. In a Taos Institute qualitative inquiry seminar, Drs. St. George and Wulff (personal communication, May 30, 2009) reminded participants that every decision made must be in the service of answering the research question: In what ways has or does this leadership development program influence your life, professionally and personally? Subquestions included the following: What led you to enrol in this leadership development program? What difference has the program made, or does it continue to make to you? How is leadership showing up in your life?

Articulating a Stance

I intentionally sought a doctoral program that would invite a social constructionist stance. From this chosen epistemological stance, according to Harlene Anderson (2009) of the Taos Institute, one assumes that knowledge is an interactive social process:

Embedded as it is in culture, history, and language, knowledge (i.e., theories, ideas, truths, beliefs, or how to) is produced within and through social discourse. The construction of knowledge is an interactive interpretive process in which all parties contribute to its creation, fluidity, sustainability, and change; therefore, it is not fundamental, definitive, fixed nor discovered . . . the invitation is to act as a catalyst for conversational partnership; a space, a relationship and a process in which each person participates in dialogical construction of newness and has a sense of ownership of it. (p. 2)

Anderson's (2009) words articulated my understanding of how knowledge is cocreated in "the metaphorical space between us" (p. 2). I was not interested in a modernist, positivist approach based on my own personal bias. My bias toward a constructionist belief system was based on my own life experience and stretched back, long before I became interested in leadership development.

After listening to Sheila McNamee and Dian Marie Hosking (personal communication, June 27, 2007) discern different ways of approaching research in a Taos Institute workshop, I realized that ever since high school I have resisted the positivist "received view of science assumption" that the world is a fixed, fact-filled, this and that, agreed upon, measurable phenomenon to be investigated and reported upon (Lichtman, 2006; Merriam, 2002; Seale, Gobo, Gubrium, & Silverman, 2007; Thorpe, 2008). The high school teachers and university professors who made declarative generalizations seemed (to me) to be missing exciting opportunities for exploration and learning

Ken Gergen (1994) wrote in *Realities and Relationships*, "It is the celebration of the individual mind—its capacity to organize sense data, reason logically, and speculate intelligently—that has served over the centuries to insulate Western culture from the disabling assaults of doubt" (p. viii). When I was learning how to be a theatre teacher I often felt doubtful and disabled, and I thought that having the right answer would come in handy, even though having the right answers did not always work. The right answers sometimes made situations worse. According to Clarke (2005), most research has "relentlessly sought commonalities of various kinds in social life while evading and avoiding representations of the complications, messiness, and denseness of actual situations and differences. Variance or difference is even called 'noise' in some approaches to research" (p. xxviii). I was interested in the messiness and the noise.

My bias away from a positivist stance in research only strengthened when I became a parent. I realized that every decision I made was related to where I was, which child I was with, who was watching, what the current situation offered, and whose voices were muttering to me inside my head (e.g., my parents, other parents, my grandparents, child-raising experts, and neighbours) explaining to me, often not in agreement with each other, what any good mother should do in this situation. All of these factors influenced how I behaved in any given moment. The parenting literature was often helpful, but at times I felt more confused about my seeming lack of parenting ability. It seemed impossible to me that one scientifically proven (and right) answer existed when faced with a parenting challenge. I learned that moving forward through a difficult parent-child situation happened between my children and me. It was in our relationship and in our conversations, the space between us, that opportunities and possibilities for handling things differently lived. It was easy, therefore, to align myself with the constructionist perspective that:

The attempt to articulate universal principles of the right and the good, which stand above and outside the hurly-burly of daily interchange, is misleading. In the end, all that is meaningful grows from relationships, and it is within this vortex that the future will be forged. (Gergen, 1994, p. ix)

This constructionist approach also aligned with my interest in improvisation. As Poynton (2008) reminded us in the opening of *Everything's an Offer*, no matter how well read, prepared, or organized one is to tackle a particular situation, the unexpected happens and one needs to simply respond to whatever is happening. Poynton wrote, "Nobody has a script for his or her life. . . . The idea that we can plan our lives with certainty and security is largely an illusion. Hence the old joke: 'How do you make God laugh? Show him the plan'" (p. 9).

Researching Leadership Development from a Constructionist Stance

Scholars have been exploring the nature of leadership and its development in organizational studies for over a century (Day, 2000; Fendt & Endrissat, 2007; Jackson & Parry, 2008). Much of the research has approached the subject quantitatively and from a positivist stance in an attempt to improve leadership efficiency and effectiveness and to seek answers about what good leadership is, how to perform it, and how to develop more of it (Harter, 2008). According to Alvesson and Sveningsson (2003) and Bryman (2004), despite

great interest and sustained scholarly effort, our knowledge of leadership development has not advanced much. Barker (1997) voiced his opinion more strongly and wrote, “In other words, the study of leadership as an academic discipline is in shambles. Sources of this confusion must lie in an inappropriate application of basic assumptions: the use of old ideas to explain new phenomena” (p. 346).

In their article in the *International Business & Economics Research Journal*, Fendt and Endrissat (2007) blamed part of the difficulty we continue to have understanding leadership on the field being largely dominated by quantitative studies. Citing Dachler, Fendt and Endrissat claimed that leadership issues are mostly approached from a “positivist epistemological stance that views leadership as a ‘reality out there,’ as an object separate from the scientist who observes it” (p. 50). Fendt and Endrissat argued that even when qualitative methods and tools such as ethnography, grounded theory, or interviews are incorporated into the research design, data are typically analyzed using more traditional positivist logic, seeking the scientifically right (and good) answer.

My clients often seek right (and good) answers to their respective challenges and the tendency to ask for an easy, quick fix helps me understand why many leadership development researchers set out to quantify, measure, and present data and generalized conclusions intended to improve effectiveness in an objective, formulaic way. As Peter Vaill (1998) argued in *Spirited Learning and Leading*, “For decades we have tried to say the wrong thing better and better . . . but no matter how well we say it—it will not feel right” (p. 11). Vaill explained that this “wrong thing” (p. 11) is what he calls facts-and-methods.

We’ve busily collected facts and invented methods and have then told managers if they want to be effective they have to absorb our facts and learn our methods . . . practicing managers have been saying for years, “My situation is more complex and unique than your theory allows for!” (p. 12)

Even if one were open to researching leadership from a positivist perspective, which I was not, the challenges are vast. In his journal article, “How Can we Train Leaders if We Don’t Know what Leadership Is” Barker (1997) asks,

If sorting out an individual’s characteristics for study is difficult, how much more difficulty is added by the group’s complexities? The implications of the emerging paradigm for the empirical approach are

mind-boggling. The new paradigm may ultimately prove to be unapproachable by the Cartesian theory of explanation, which for many deductivists is reason enough to reject it all together. Then again, the empirical approach is not working regardless of its propensity for research. (p. 356)

There are scholars who adopt a relational stance to exploring leadership (Drath, 2001; Harter, 2008; Hosking, 2006), and I wanted to join them. We are in the middle of a shift in thinking about leadership (Drath, 2001; Harter, 2008; Jackson & Parry, 2008), and along with that shift in thinking, researchers are moving “away from individualistic, essentialist and atomistic explanations toward more relational, contextual and systemic understandings” (Balkundi & Kilduff, 2005, p. 942).

Researchers working from a positivist stance have expressed frustration with their own attempts to study leadership and its development:

To accurately measure the effectiveness of a program under ideal conditions, a control group with no leadership development input should be compared to the study group; both should be tested and retested over time, using the same instruments and observers; everyone should answer with complete honesty and full self-awareness to avoid desirability bias; and the whole exercise should take place in a quasi-vacuum, with no discernable extenuating circumstances in the organizational environment during the time of the study. (Kets de Vries, Florent-Treacy, Guillen Ramo, & Korotov, 2008, p. 3)

Hansen, Ropo, and Sauer (2007) asserted that most leadership research has watered down the rich phenomena of leadership. Jerry Hunt (as cited in Hansen et al., 2007) observed, “If leadership is bright orange, then leadership research is slate grey” (p. 544).

I wanted to bring some bright orange onto the palette and, as Lather (as cited in Clarke, 2005) suggested, “My interest is in a less comfortable social science, one appropriate to a postfoundationalist era characterized by the loss of certainties and absolute frames of reference” (p. xxvii). Gergen and Gergen (2004) stated that when you are in a conversation with a social constructionist, “Tensions and insecurities are not feared because to establish a final truth, a foundational logic, a code of values or one slate of practices would be contrary to the very unfolding of ideas” (p. 7).

I was interested in tensions and uncertainties and committed to exploring the research question with as many participants as possible. I wanted to tap into and privilege the “local or home-grown knowledge” (Anderson,

2009, p. 2) of the graduates who, as Anderson wrote, “have first-hand knowledge and experience of themselves and their situation . . . knowledge formulated within a community is the product of relational expertise and will be more relevant, pragmatic, and sustainable for that community” (p. 2).

As Hosking (2006) wrote, “Inquiry can embrace its relational-constructive qualities by shifting emphasis—to ‘opening up’ new possible identities and local worlds—to transformation rather than simply ‘finding out’” (p. 275). I wanted to find out possible answers to the research question, of course, and beyond that I wanted to invite rich conversations among all research participants and continue our collective leadership learning together.

Selecting a Methodology

The next question was: what methodology would best serve the research question? A constructionist approach to this research was clear. How to actually design and conduct the study was in question for longer than I like to admit.

Strauss and Corbin (1990) have defined methodology as “a way of thinking about and studying social reality” (p. 3). Strauss and Corbin reminded us that the real nature of reality is impossible to capture, “but hopefully research moves us increasingly toward a greater understanding of how the world works” (p. 4). I was tempted to suggest a constructionist tweak to Strauss and Corbin’s definition by adding: “but hopefully the research moves us increasingly toward a greater understanding of how the . . . [situation under inquiry] works” (Strauss & Corbin, 1990, p. 4).

Qualitative research, according to John Creswell (2009), is “a means for exploring and understanding the meaning individuals or groups ascribe to a social or human problem” (p. 4). Creswell defined qualitative research as a process that involves emerging questions in an inductive style with importance placed on describing the complexity of the situation being studied. The data analysis builds from specifics and particulars to general themes, with “the researcher making interpretations of the meaning of the data” (Creswell, 2009, p. 4). A qualitative perspective implies there are multiple constructions and interpretations of reality that change over time, and that one can only attempt to understand what those interpretations are at “a particular point in time and in a particular context” (Merriam, 2002, p. 4). I learned, however, that “qualitative research is an immensely diverse set of practices, involving an increasingly large subject-disciplinary range” (Seale et al., 2007, p. 2). As Seale et al. wrote in their introduction to *Qualitative Research Practice*,

The great diversity of theoretical approaches, practical problems and local research traditions that people within these disciplines encounter—as well as the different audiences to whom research is addressed—mean that any categorisation of qualitative research practice into a series of progressive stages is likely to be experienced as unhelpfully ideological. (p. 2)

As I began my working relationship with my dissertation supervisor, Sally St. George, I was invited to read and cowrite a review of Marilyn Lichtman's (2006) book *Qualitative Research in Education: A User's Guide*. Sally echoed Lichtman's (2006) advice: "You will need to decide what is important and what you accept. Since qualitative research has no right answers, this puts you in a state of flux" (p. xvi). Flux turned out to be an understatement, as 18 months later I was still deciding how to begin.

Seale et al. (2007) warned of a "regrettable abstraction and hyper-theorization of research" (p. 1) that hides authors' limited experience behind fancy terminology and jargon. In an entry to my research journal dated July 7, 2008, I wrote,

I still don't even know what I'm asking and how I'm going to ask it. I can't understand what these academics are saying—their language alienates and intimidates me. Do I even belong here? I'm losing it—if there is no traction on this then I need to be brave and quit. Why fake it?

Adele Clarke's (2005) *Situational Analysis* offered a possible perspective from which to approach this study. Clarke opened her book writing, "We are today in the midst of a renaissance of qualitative approaches to research . . . [and] within this renaissance, established methods are also being reinterrogated" (p. xxi). Clarke described a shift in emphasis that has been taking place across many academic disciplines whereby researchers are interested in "partialities, positionalities, complications, tenuousness, instabilities, irregularities, contradictions, heterogeneities, situatedness, and fragmentation – complexities" (Clarke, 2005, p. xxiv). Clarke's fresh approach to grounded theory, called situational analysis, "allows researchers to analyze complex situations of inquiry broadly conceived" (p. xxii). I first needed to learn more about grounded theory to comfortably relate with Clarke's (2005) iteration.

Jones (2002) wrote that her choice of grounded theory methodology provided "structure to my research questions as well as preserve the integrity of the perspectives of those individuals participating in the study" (p. 175). It

was two central elements of grounded theory that led Jones towards her choice:

First, a grounded theory approach assures close proximity between theory and the experiences of those involved in the study. As the name implies, theory is grounded because it is anchored in the words, experiences, and meaning making of participants. . . . Second, the analytic process characteristic of grounded theory methodology can be understood as storytelling. What I mean by this is that the researcher begins with the individual stories of each participant in a study and then, through the analytic process, takes the story apart and puts it back together again in a way that tells the story of all the participants. (p. 176)

Jones's use of the word storytelling was something that made grounded theory seem accessible to me, implying a use of language that would welcome readers.

Strauss and Corbin (1998) described grounded theorists as people who tend to be flexible, open to helpful criticism, enjoy the play of ideas, and can appreciate the give and take that happens in group discussions. These grounded theorists "tend to be sceptical of established theories, however enticing they might seem, unless these eventually are grounded through active interplay with the data" (Strauss & Corbin, 1998, p. 6). Strauss and Corbin added that most researchers using this methodology hope that their work has direct or potential relevance for both nonacademic and academic audiences because the methodology encourages taking the words and actions of the participants very seriously. Strauss and Corbin's description of grounded theorists fit me.

The word theory sounded very grand—what was a theory, exactly, and would I be able to create one? It was helpful to read a review of Anfara and Mertz's *Theoretical Frameworks in Qualitative Research* written by Candace Lacey (2009):

To understand theory is to travel into someone else's mind and become able to perceive reality as that person does. To understand a theory is to experience a shift in one's mental structure and discover a different way of thinking. To understand a theory is to feel some wonder that one never saw before what now seems to have been obvious all along. To understand theory, one needs to stretch one's mind to reach the theorist's meaning. (p. 101)

Clarke (2005) argued that “the era of grand or formal theory is long over” (p. 293) and that constructionist grounded theorists theorize rather than build formal theory. Clarke indicated that theorizing creates sensitizing concepts: “Whereas definitive concepts provide prescriptions of what to see, *sensitizing concepts merely suggest directions along which to look*” (Blumer, as cited in Clarke, 2005, p. 293).

Clarke’s (2005) perspective and Jones’s (2002) use of the word storytelling in relation to theory helped me move forward. Theorizing (or cocreating a story) about what was happening in the lives of program graduates was precisely what I wanted to do, and I wanted the participants to join me in the process.

Getting Clearer About Grounded Theory and Situational Analysis

As Dey (2007) pointed out, “There is no such thing as ‘grounded theory’ if we mean by that a single, unified, methodology, tightly defined and clearly specified . . . we have different interpretations of grounded theory” (p. 80). Dey explained that when Glaser and Strauss launched grounded theory in 1967, “sociology’s ‘armchair theorists’ represented to them the epitome of unproductive social science” (p. 81). Dey offered a brief history of grounded theory explaining the versions of Glaser, Strauss, Strauss and Corbin, and Charmaz (among others), and he underlined the distinctions among the various iterations. Glaser and Strauss (as cited in Dey, 2007) originally set out to “devise a different relationship between theory and research, one that would liberate theory from the seductive comforts of the armchair and empirical research from the uninspiring and restrictive confines of analysing variables or verifying hypotheses” (p. 82). Grounded theory evolved over the years, and Keddy et al. (as cited in Dey, 2007) and Wilson and Hutchinson (as cited in Dey, 2007) described how, like parents outgrown by their children, Glaser and Strauss “have suffered the indignity of being ‘corrected’ by their offspring (Keddy et al.)” (Dey, 2007, p. 80).

Clarke’s (2005) iteration of grounded theory starts with the premise that any situation, “is itself open, indeterminate, changing, unstable, unfixed, tenuous, temporary” (p. 296) and her concrete methods of creating various maps along the way “can only be understood as analytic snapshots in time and space” (p. 296). Clarke saw social processes as central in situational analysis and suggested that as researchers, our “attention centers on the *organizational*, *institutional*, and discursive *relationships* rather than on organizations and

institutions per se” (p. 296). In situational analysis, local differences and complexities are intentionally featured.

The historical underpinnings of grounded theory, combined with Clarke’s (2005) innovative approach to situational analysis were a good fit for this research process. Clarke’s interest in the complexity of any situation and her belief that “there is no ‘god’s-eye view’ position from which to write up research” (p. 18) had me hooked. The foundation for beginning the study was in place.

Which Methods Should I Use?

It was time to consider “a set of procedures and techniques for gathering and analyzing data” (Strauss & Corbin, 1998, p. 3). Buchanan and Bryman (2007) suggested that researchers look at method selection “as an integral component of a wider, iterative, coherent research system, influencing the social possibilities of data collection as well as the substantive nature of data collected and the nature and direction of theory development” (p. 483). I read exemplary dissertations conducted from a social constructionist stance and learned how researchers presented their chosen methods.

One such dissertation that inspired me was Rita Valade’s (2004) “*Oh My God! Look Out World.*” Valade shared her experience as a researcher:

It has been my experience in reading qualitative and action research studies that, in their reporting, little attention has been given to how the research was planned, inclusive of its details. It is one thing to claim that the direction of the research endeavor is totally dependent upon the participants. It is another thing to acknowledge that the initiating researcher had some sense of an anticipated flow of the research project. (p. 68)

In this section I describe the initial plan and design of this research project, along with the rationale and purpose behind those choices. I also explain what actually happened.

Seale et al. (2007) argued that traditional methodology is the result of a positivist, rationalistic view “which considers research activities as driven by a set of norms, rules, and transparent procedures” (p. 8). Seale et al. encouraged qualitative researchers to adapt their methodology and methods to the research situation. “In other words” (p. 8), Seale et al. wrote, “instead of forcibly applying abstract methodological rules to contingent situations, the research situation is placed in a position of dialogue with methodological rules” (p. 8). I

appreciated Seale et al.’s recommendation not to reject the usefulness of methodological rules, but “instead, reject top-down rules and prefer bottom-up, user-centred and context-dependent methodological routines and agreements” (p. 9). I aimed to conduct the research in a manner that was comfortable and natural for me and for the participants.

Table 5 provides my initial design, the outcome of the dialogue between the methodological rules I explored through the literature and what I understood about the unique situation under inquiry.

Table 5
Initial Research Design

Phase	Activity	Purpose
1	Create messy maps (Clarke, 2005) of the situation to be analyzed: leadership development program and its context.	Intellectual wallpaper to make explicit my biases and document inherent complexities.
2	Obtain formal permission (beyond emails) from Government of Alberta to conduct research.	Ethical obligation to the organization, research participants, and Tilburg University.
3	Determine dates, times, and locations for the group sessions to be held in Edmonton and Calgary. Invite participants to engage in the research.	To welcome program alumni as valuable participants in the research.
4	Have consent forms prepared for all participants.	To meet ethical obligations and help create safety for participants.
5	Conduct Interview Matrix session with volunteer participants (video and audio recording), data captured on flip charts, include participants in the initial coding	To tap into the wisdom and experience of the program participants in a collaborative, equal-air-

	and ask for volunteer coresearchers to monitor and offer feedback on future analysis – in Edmonton.	time way and learn from them what they see in the data and give them a chance to reconnect, reflect, and learn with each other.
	Use Clarke’s (2005) mapping techniques to support analysis.	
7	One-on-one interviews with new consent forms based on data and analysis of previous two phases, along with consistent analysis (using Clarke’s situational analysis mapping techniques) – until saturation.	Deepen the understanding of the data using the constant comparison approach to data analysis.
8	Invite participants to offer feedback before preparing the final report.	To increase the chances of representing findings and theorizing fairly and accurately.

Honouring Ethical Obligations of Conducting Research

Foremost in the research design were the ethical obligations I had to both the host organization and the participants involved in the research. As Anne Ryen (2007) wrote, “The three main issues frequently raised in the Western ethical research discourse and part of the professional association statements and national research guidelines on ethics are codes and consent, confidentiality and trust” (p. 219).

Codes and consent, according to Ryen (2007), imply that research participants have the right to understand that they are being researched and the right to understand why they are being invited to be part of a research initiative. Participants must be informed that they have the right to withdraw from the research initiative at any time without penalty or negative consequences. I responded to this ethical issue by first garnering support and permission from the host organization, the Government of Alberta (specifically AEII). An invitation to participate was sent to all graduates of the leadership program explaining the focus of the study with a clear explanation of the

purpose behind the study (see Appendix A), and all participants granted informed consent in writing before beginning their participation.

The second standard ethical issue refers to confidentiality, and researchers are obliged to protect the participants' identity. As this particular research project considered the experiences of several participants from a large potential sample (over 1000), confidentiality was relatively easily maintained, and any references to specific colleagues, teams, divisions, and departments were removed from the collected data.

Valade's (2004) dissertation presented an interesting ethical dilemma for consideration when her research participants did not want to remain anonymous. According to Dr. Dan Wulff, Valade's dissertation committee chair, the research participants not only wanted their names identified in the published dissertation, but they wanted their pictures included as well. Valade's experience highlights the complexity of ethical decision-making and reminded me that although ethical guidelines are clearly established to protect research participants and that researchers are obligated to do no harm (Merriam, 2002; Palys, 1997; Seale et al., 2007), there may be situations in which a researcher must step back from the guidelines and consider what is best for all involved in the research process. To be relationally responsive, Valade chose to honour her participants' request and asked the university's ethical review committee to reconsider traditional ethical guidelines.

As I planned to invite participants to be coresearchers, it was possible participants might negotiate to have their names included, especially those who saw their contribution as having a potentially positive bearing on their professional advancement. I also needed awareness of participants possibly fearing negative consequences of their stories being disclosed. A commitment to confidentiality was important and that commitment was made explicit in the informed consent form (see Appendix B).

Ryen (2007) explained that trust, the relationship between the researcher and the participants, is another ethical consideration. Trust, according to Ryen, "is the traditional magic key to building good field relations, a challenge constantly unfolding during the research process" (p. 222). Unless potential participants trusted me enough to volunteer their stories, I would have no data with which to make sense of the research question. It was in my best interest to craft a welcoming invitation that informed potential participants of the purpose behind the research and emphasized the voluntary nature of their participation.

Ryen (2007) wrote that trust also relates to the eventual representation of data. Expanding on the importance of ethical report writing, Ryen referenced Kvale, Seale, and Silverman's concerns that just because a qualitative report may be a loyally written representation of what was said in interviews or focus groups, "the report tells us very little about what has been excluded from the report" (p. 224) and whether there were topics that the researcher chose to avoid. Marilee Goldberg Adams's words were top of mind, words I heard in a lecture: "We live in the world that our questions create" (L. Rome, personal communication, March 15, 2002). I was reminded of the inherent power and influence a researcher has, simply in choosing which questions to ask and which to avoid.

As a facilitator within the program being studied, I had a vested interest in the influences it is having on participants. Favourable stories would bode well for the program and, consequently, for my own continued employment within the program. Several government leaders awaited the final report, and I stood to gain respect and potential work engagements due to conducting the research. Participants in the research might have been compelled to share only their triumphs, victories, and positive leadership experiences to please me or to make me feel good. All of these issues influenced the conduct of the study and the findings and are important contextual aspects.

Merriam (2002) wrote that it is impossible to imagine all possibilities and one's reaction to those possibilities before diving in to collect data and that "examining the assumptions one carries into the research process—assumptions about the context, participants, data, and the dissemination of knowledge gained through the study—is at least a starting point for conducting an ethical study" (p. 30). In keeping with my constructionist stance, I appreciated Ryen's (2007) point of view that "ethical issues deal with ethical practice, but ethics is itself a field socially constituted and situated" (p. 233).

Sampling, Inviting, and Choosing Research Participants

"The main reason we sample is that it's frequently impossible, impractical, or just plain silly to assess every unit or object of interest to us" (Palys, 1997, p. 122). According to Giampietro Gobo (2007), sampling has "been long neglected by many qualitative researchers as a mere positivistic worry" (p. 405). Gobo recommended clearly defining sampling units to avoid messy and shallow research and he saw sampling "as an unavoidable consideration because it is, first of all, an everyday life activity deeply rooted in thought, language and practice" (p. 405). It would be difficult to collect and

analyze the experiences of several hundred leadership program graduates, yet I wanted to research inclusively. I would begin by inviting a large sample, and then use theoretical sampling to choose interviewees later on as the analysis and data gathering continued. The process of theoretical sampling “is concerned with constructing a sample which is meaningful theoretically because it builds in certain characteristics or criteria which help to develop and test your theory and explanation” (Mason, as cited in Gobo, 2007, p. 416).

The program administration team indicated that the Freedom of Information and Protection of Privacy Act (2000) limited my access to program graduates (K. Freier, personal communication, September 10, 2008). According to the legislation, I could not have access to graduates’ contact information, and I created a short, introductory description of the research project with an invitation for prospective participants to contact me directly if they were interested in participating (see Appendix A).

Data Collection Method #1 – The Interview Matrix

The process of theorizing would be an iterative back and forth journey between collecting data and analyzing that data. Miller and Salkind (2002) wrote,

While the researcher collects data, the process of data analysis begins. In fact, an image for data collection in a grounded theory study is a “zigzag” process—out to the field to gather information, analyze the data, back to the field to gather more information, analyze the data, and so forth. (p. 156)

I explored what my first “going out to the field” (Miller & Salkind, 2002, p. 156) might look like in order to collect the kind of data I required to begin the zigzag. I wanted to include as many graduates in the process as possible because I was interested in beginning with a wide range of data, rather than a more traditional grounded theory approach of starting with one-on-one interviews.

I required a method for effectively gathering the wide variety of responses that I wanted to begin the first stage of analysis. Clarke (2005) wrote about the methodological implications of researching any situation and suggested to take very seriously the situatedness, variations, differences, and ambivalences that will undoubtedly surface with careful analysis, “with all of their complexities, multiplicities, instabilities, and contradictions” (p. xxviii). Clarke stated her commitment to bringing “*the full situation of inquiry*—further around the postmodern turn and ground it in new analytic approaches

that do justice to the insights of postmodern theory” (p. xxviii). I chose Bob Chartier’s (2002) interview matrix design, a practical method based on my own practice and my already existing relationship with research participants.

The interview matrix is designed to build dialogue in groups and, Chartier wrote, “It is one of the more powerful ways to get the whole group engaged in dialogue, with equal air time, focus, and . . . without everyone making mini-speeches at each other around a table” (p. 70). This was the type of method I needed to tap into the experiences of a wide variety of program participants, while simultaneously offering them an opportunity to come together in community, strengthen their relationships, and further their leadership learning from and with each other. Charmaz (as cited in Wilson, 2009) reminded us that “grounded theory offers a set of flexible strategies, not rigid prescriptions” (p. 6). With its emphasis on one-on-one interviews within a large group setting, and the opportunity to immediately analyze the data, the interview matrix seemed like a suitable method for gathering the first set of data.

Here is a step-by-step description of how I adapted the interview matrix design to support this research initiative:

1. **Planning:** The interview matrix is based on units of four. I needed four questions, four flip charts, and starting groups of four people in each group. The four questions, outlined below, were developed after reading Kvale’s (1996) advice about creating effective interview questions:
 - When you think back to being in the program, what do you remember as highlights? What stories about the program do you tell most often?
 - What influence has the leadership development program had (or continues to have) on you?
 - How is leadership showing up for you in day-to-day life, professionally and personally?
 - What difference has the program made in the way you engage in conversations, and in your relationships?
2. **Doing:** Beginning from the large group, one flip chart in each corner of the room featured one of the four focus questions. I broke the large group into smaller groups of four (each person is assigned a number one to four and thus owns one of the four questions).

Each participant was given a blank template with space for the results of three upcoming interviews.

3. **Interviews:** There were six rounds of one-on-one interviews. I planned on 10-minute interviews. The sequence of interviews is: (1-2, 3-4) (2-3, 4-1) (2-4, 3-1) (3-2, 1-4) (4-2, 1-3) (2-1, 4-3). For example, in the first interview, #1 interviews #2, and #3 interviews #4. Each interviewer carefully recorded the key responses to the interview question. At the end of each interview, I asked each interviewer to check with his or her interviewee to see if the most important aspects of the interview had been captured. This was an opportunity to both validate and clarify the interviewee's responses and to check the interpretation of what was heard and recorded on the template. Then I announced the next round of interviews, offered participants one minute to re-arrange seating with the new interview partner and carry on. This continued through each of six rounds of interviews.
4. **Editing:** The next component was the editing stage: ones went to flip chart #1 to compare their notes, twos went to flip chart #2, and so on. By comparing and contrasting their notes, each group of interviewers captured key words, phrases, ideas, and concepts that had been gathered in their interviews in response to their respective focus question. My instructions to them were simple: as you compare your interview notes, honour the diversity of what you heard while eliminating overlap. The participants poured over their interview notes, underlined what they saw as key phrases and ideas, and made meaning together. Gathered around flip charts, the participants captured the key themes in response to the question that had guided their inquiry. Each interviewer was able to add his or her own personal response to the question asked. To this point in the process, interviewers had simply been reporting on their interviewees' responses, and at this stage they added their own perspectives onto the flip charts. I prompted the participants by asking questions such as, "what do you notice in the data," and "what ideas do you see in the data as you compare and contrast your interview notes with each other?"
5. **Sharing and Dialogue:** Next, the whole group visited each flipchart and commented on and offered feedback about whether

their ideas and voices were represented on the flip charts, with the feedback being captured in the moment.

I realized that in the context of this research initiative, the interview matrix method offered both opportunities and challenges. I saw excellent opportunities for research participants to come together in community, to further their own leadership learning by reflecting upon and sharing their experiences and insight, to hone and practice their interviewing skills by asking questions and listening deeply, and to support me in collecting data that would form the foundation to develop answers to the research question. In keeping with appreciative inquiry principles (Barrett & Fry, 2005; Schiller, Holland, & Riley, 2001), I also hoped that the Government of Alberta (as the host organization) would benefit from the process as members of the organization shared their leadership experiences with each other. Barrett and Fry (2005) described the cooperative capacity that resides in every social system and that the experience of coming together to reflect appreciatively on one's leadership learning "creates both positive affect and relational 'knowing' that reveals shared, co-constructed realities . . . to find new ways to work together for a common purpose" (p. 95). Cooperrider wrote in the forward to *Appreciative Leaders* (Schiller et al., 2001),

It is about the amazing energy that is available when we realize that organizations are centers of human relatedness, first and foremost, and relationships thrive where there is an appreciative eye and when people see the best in one another, when they share their dreams and ultimate concerns in affirming ways, and when they are connected in full voice to create not just new worlds but better worlds. (p. x)

By asking for participants' support in analyzing and making meaning of the interview matrix data, I hoped to have a more comprehensive perspective on how the data could be interpreted. I planned to conduct follow up interviews for checking and rechecking, intentionally seeking contradictions in order to surface and make explicit the messiness that Clarke (2005) invited during situational analysis. Just as Nachmanovitch (1990) described the learning that results from collaborative play during improvisation,

Here is a whole vast universe of play, not only with the close friends who love us, but also with people whom we may not know so well but who somehow appear to drop just the right piece of new information in our ears at the right time (or a reminder of what we once knew but forgot). (p. 96)

The possibilities for experimenting and honing the interview matrix method through applying it, reflecting on its effectiveness, and documenting my learning also meant that I might contribute to the current literature on qualitative research processes and methods.

The challenges that came to mind in considering the use of the interview matrix were many and the challenges came in the form of questions. How many program graduates would volunteer to participate? How would I encourage healthy interview protocol (Kvale, 1996) in order to increase the likelihood of interviews that would generate rich data? How would I (or we) analyze the data in a credible, reliable, trustworthy manner when I was not the primary data collector? If I asked research participants to help code and analyze the data, how would I maintain credibility as a researcher when I was not privy to the original interviews or the conversations that occurred during the initial coding? These were all important questions for consideration.

My concerns about using the interview matrix deepened as I turned to the literature for examples of other researchers who invited participants to conduct interviews and analyze the resulting data. In Denzin and Lincoln's (2008) *Strategies of Qualitative Inquiry*, Charmaz (2008) warned, "Researchers need to weigh whether, when, how, and to what extent to bring research participants into the process. Although well intended, doing so may create a series of knotty problems in concrete situations" (p. 210). Janice Morse (as cited in Charmaz, 2008) indicated that the consequences of bringing participants into research decisions "include keeping the analytic level low, overstating the views of participants who clamored for more space in the narrative, and compromising the analysis" (p. 210). Below, I describe the process I took in responding to the questions above in order to move forward with deliberate steps.

Slowing Down My Process in Order to Move Forward Quickly

One of my main concerns was establishing a plan for analyzing data due to stories I heard from fellow students (personal communication, May 20, 2006) about the overwhelming challenge of deciding how to analyze large amounts of data once it had already been collected. Chapter 10 in Steiner Kvale's (1996) *InterViews* is titled "The 1,000 – Page Question" (p. 176) and in that chapter he wrote that qualitative researchers sometimes ask him a question such as, "How shall I find a method to analyze the 1,000 pages of interview transcripts I have collected?" As an experienced researcher, Kvale impulsively reacted that one should: "Never pose that question" (p. 176)!

Kvale explained that a more supportive reply would be, “Never conduct interview research in such a way that you find yourself in a situation where you ask such a question” (p. 176). With my tendency to jump into projects feet first without a lot of forethought, it was easy for me to imagine myself asking a similar question.

Catherine Bruce (2007) suggested that in response to the academic and practitioner communities’ strong call for transparency of methods, “qualitative reports must make every effort to describe the details of collection and analysis so that the reader believes the study to be credible, transferable, and dependable, whether claims are made about generalizability or not” (p. 11). Bruce explored questions about how data collection and analysis interact in practical terms, what constitutes sufficient data, and if research could be both well-planned and emergent.

Ian Dey (2007) believed that “nowadays, grounded theory has become associated above all with a set of procedures for analyzing data, not just producing it” (p. 84). Dey wrote about a growing awareness of the vital relationship between data collection and data analysis, “which has shifted the methodological focus from how to get good data to how to make good once you have got it” (p. 84). Dey encouraged researchers to consider and plan a systematic framework for analyzing data each step of the way. As the first round of data was going to be analyzed by the participants themselves, this planning step was vital.

Despite my eagerness to begin collecting data, I slowed down to consider how, when, and with whom I might analyze the data, reflected upon why those possible analytic options were viable. Lichtman (2006) wrote, “I have found it very frustrating to try to determine specifically how to conduct analyses. Almost all of the material you read will leave you with more questions than answers” (p. 163). As I began searching for examples of data analysis processes in research initiatives that involved participants in the analysis, I found myself agreeing with Thorn’s (as cited in Lichtman, 2006) statement: “Qualitative data analysis is the most complex and mysterious of all the phases of a qualitative project, and the one that receives the least thoughtful discussion in the literature” (p. 160).

Bruce (2007) concluded that “transparency and clarity of methods used, as well as an acknowledgement of tensions faced in relation to method, are essential ingredients to increasing our understanding of complexities and ensuring integrity of conclusions” (p. 11). Demerutis (as cited in Bruce, 2007) emphasized that “such efforts at transparency will make our work more

accessible to others, and their subsequent judgments will ultimately be of benefit to us” (p. 11). This section is my acknowledgement of the tensions that existed as I designed my analysis plan.

Choosing the interview matrix process implied that I would be at a distance from the primary data sources during the first phase of data collection—I would be facilitating the participants’ process as they interviewed each other. The interview matrix also allowed for the participants, with their interview notes, to analyze the data. As facilitator, I would offer tips and guidelines for conducting productive and respectful interviews, write effective field notes, and then begin their collaborative analyses of the collected data. What I could not do was directly hear every interview or be involved in every step of their analyses.

To alleviate the small concern I had about my choice to use the interview matrix, I turned to the literature around participative inquiry and practice, I studied authors’ perspectives on new approaches to grounded theory and Kvale’s (1996) interview methods, and looked for guidance from scholars on the coding and interpretation of data.

Support from Participative Inquiry and Practice Literature

In the online version of the introduction to their *Handbook of Action Research*, Peter Reason and Hilary Bradbury (2006) drew “together some of the threads that form the diverse practices of action research” (p. 1). My study was not officially named an action research initiative, but from the beginning I was committed to a participatory and relational approach to conducting the research (Hosking & McNamee, 2006). In my attempt to articulate the relationship between Reason and Bradbury’s interpretation of action research and my choice of data collection and analysis methods, I turned to their opinion that “the institutions of normal science and academia, which have created such a monopoly on the knowledge making process, place a primary value on pure research, the creation of knowledge unencumbered by practical questions” (p. 3). One of my practical questions was why should my ability to interview participants, record their responses, and interpret the data be given more privilege or status than the participants’ capacity to do the same? Were we not all in this together?

Reason and Bradbury (2006) shone light in their writing on the political nature of research initiatives and wrote, “The political imperative is not just a matter of researchers being considerate about their subjects or acting ethically: it is about the democratic foundations of inquiry and of society”

(p. 13). Paraphrasing Paine (as cited in Reason & Bradbury, 2006), the authors continued, “it is for the people themselves, in their own right, to enter into agreements with each other to discover and create knowledge, and this is the only principle on which research and inquiry has a right to exist” (p. 13). I wanted to design research that would produce credible, useful knowledge to further the field of leadership development while also growing the capacity and confidence of research participants to continue their own leadership development journey. Reason and Bradbury posited:

Participation can also empower them at a second and deeper level to see that they are capable of constructing and using their own knowledge . . . thus participation is also a process of consciousness raising . . . that explicitly aims to educate those involved to develop their capacity for inquiry both individually and collectively. (p. 13)

Reason and Bradbury’s book featured quotations from various writers who were aligned with their philosophical stance towards participatory action research. Two of those quotations stood out. Marja-Liisa Swantz (as cited in Reason & Bradbury, 2006) wrote,

I do not separate my scientific inquiry from my life. For me it is really a quest for life, to understand life and to create what I call living knowledge – knowledge which is valid for the people with whom I work and for myself. (p. 1)

Orlando Fals Borda contributed, “We must keep on trying to understand better, change and re-enchant our plural world” (p. 1). I wanted the graduates of the leadership development program to be active participants in this research initiative, and I believed that inviting them to interview each other and collaborate to analyze the collected data was a valid choice in the context of our working relationships and the goals of the research.

Turning to Grounded Theorists for Even More Support

In “On Coming Home and Intellectual Generosity,” Adele Clarke and Susan Leigh Star (1998) coedited a special issue centred on work in the tradition of Anselm Strauss. I took confidence from Clarke and Star’s article as they described Strauss as having an “intellectual generosity” (p. 3) and as being “exceptional in how much he relished people taking his work and ideas and running with them in new (and often unanticipated and even shocking) directions” (p. 3). Clarke and Star identified Strauss as being “one of those rare scholars who grasps how much of an honour this is, even when those ideas are occasionally mangled” (p. 3). Their words had me wondering if my plan to

include research participants in both the collection and analyzing of data might be one of those mangled ideas.

Clarke and Star (1998) wrote that “to a serious pragmatist, having your work be useful is delicious—useful, not catechism. It also means letting go of control and trusting in a much more pluralist point of view than that usually tolerated in the academy” (p. 3). I realized that to move forward with this design for my own research would require a certain letting go of control. I would need to pay attention to whatever happened and be prepared to record and reflect in order to maintain trustworthiness with participants and readers. I also needed to acknowledge that I was inviting participants into parts of the research journey as coresearchers and I would need to be open to being influenced and relationally responsive to whatever happened along the way. This was, perhaps, a rather risky proposition, and I needed to acknowledge that I was treading in relatively uncharted territory.

Clarke and Star’s (1998) description of their teacher, Strauss, helped overcome my misgivings. As I read the closing to Clarke and Star’s piece, I found words that helped me accept that the interview matrix was an interesting method choice:

“Study the unstudied” was a maxim we heard time and again. Do not follow the fashions, do not jump on the bandwagons of theory and public debate. Seek instead the untold stories, the quiet contributors, and the modest corners of social life where human suffering is compounded by silence. Pay no attention to the labels on the disciplinary doors bidding or forbidding you entry. Follow the questions, follow your data, and follow your own sense of inquiry and justice. (p. 7)

In Denzin and Lincoln’s (2008) *Strategies of Qualitative Inquiry*, Charmaz (2008) contributed a chapter called “Grounded Theory in the 21st Century: Applications for Advancing Social Justice Studies.” This study was not called (or intended to be) a participative action research project, nor was it intended to be a social justice study. Yet, as I read Charmaz’s chapter, I found similarities in her description of social justice inquiry participants and those who would be participating in this study:

Social justice research . . . proceeds from researchers’ and participants’ joint efforts and commitments to change practices. Because it arises in settings and situations in which people have taken a reflexive stance on their practices, they already have tools to conduct systematic research

on their practices in relation to subjective experience, social actions, and social structures. (p. 208)

The participants in this research project all graduated from an 18-month leadership development program. Throughout the program these participants practiced a reflexive stance as they reflected on their own patterns of behaviour and considered the kinds of conversations and relationships in which they participate. They too had tools to conduct inquiry and analyze data to make sense of what it might mean. This seemed another reason to feel comfortable including them in the first phase of data collection and analysis.

My intention was not to abdicate my responsibilities as a graduate student by asking participants to conduct the initial analysis of their own collected data. I was aware that it was my role to develop, eventually, as Charmaz (2008) wrote, “increasingly abstract ideas about research participants’ meanings, actions and worlds and seeking specific data to fill out, refine, and check the emerging conceptual categories” (p. 204). It was important to me, as I drew closer to initiating data collection and analysis that I did so comfortably, with a clear understanding of why.

I turned again to improvisational theory. Nachmanovitch (1990), in his book *Free Play*, suggested that when designing something new, I would reach a point at which the complexities, contradictions, paradoxes, and impossibilities pile up so high that I become overwhelmed . . . I am stuck, I have to do something, I am on the edge of a cliff. I may as well jump. Suddenly I don’t care if I ever solve this enigma; I’m alive, to hell with it. (p. 142)

It was time to jump.

Supporting Participants to Interview Well

Kvale (1996) wrote that “the interview is the raw material for the later process of meaning analysis. The quality of the original interview is decisive for the quality of the later analysis, verification, and reporting of the interviews” (p. 144). Kvale offered six criteria for a quality interview and highlighted that the last three in particular refer to an ideal interview:

1. The extent of spontaneous, rich, specific, and relevant answers from the interviewees.
2. The shorter the interviewer’s questions and the longer the subjects’ answers, the better.

3. The degree to which the interviewer follows up and clarifies the meanings of the relevant aspects of the answers.
4. The ideal interview is to a large extent interpreted throughout the interview.
5. The interviewer attempts to verify his or her interpretations of the subject's answers in the course of the interview.
6. The interview is "self-communicating" – it is a story contained in itself that hardly requires much extra descriptions and explanations. (Kvale, 1996, p. 145)

I explained these criteria to research participants and asked that they do their best to follow Kvale's (1996) expert advice. I allotted only 10 minutes for each interview, and I searched Kvale's work for insight. "Current research interviews are often too long and filled with idle chatter. . . . If one knows what to ask for, why one is asking, and how to ask, one can conduct short interviews rich in meaning" (Kvale, 1996, p. 151).

In such short, focused exchanges it was impossible for the research participants to record verbatim what their interview subjects said. Kvale's (1996) perspective offered choices that made sense given the context of this step of the research process. Kvale wrote, "Transcripts are not copies or representations of some original reality, they are interpretative constructions that are useful tools for given purposes" (p. 165), and he referred to transcripts as abstract maps. He submitted that all maps emphasize some aspects of the landscape that they describe, and ignore or omit others. Kvale advised that the transcript (or map) "depends on the intended use of the map" (p. 165). Kvale encouraged researchers to ask, "What is a useful transcription for my research purposes" (p. 166)? For the purposes of this research phase, I asked participants to record on their interview template the key words, phrases, and concepts that they heard expressed during the interview. I also suggested they ask for validation and clarification from their interviewee at the end of the interview to check on their analysis and interpretation of the conversation to that point in the process. As Kvale (1996) stated, "Analysis is not an isolated stage, but permeates an entire interview inquiry" (p. 205).

Supporting Participants to Analyze Well

Once the interview portion of the interview matrix process was completed, I supported the research participants to initiate their analysis. I

offered tips for how they might work collaboratively to interpret and analyze their data.

Clarke and Star (1998) shared Anselm Strauss's knack for teaching students how to analyze data: "Anselm would sit back, get comfortable, bend his head down a bit, peer over his glasses and say, 'So, tell us, what is this a story of?'" (p. 346)? Clarke and Star built on Strauss's storytelling theme and explained that "storytelling is quintessentially loose and informal. Sit back, relax, tell a story, listen to a story. Stories open up spaces and places. New vistas are sighted. New alternative scenarios emerge. Tales are amendable, amenable, friendly" (p. 346). This is what I wanted the analysis experience of the research participants to feel like—amenable and friendly. I wanted participants to share their stories, analyze those stories, conceptualize the key ideas, and record the various codes to share them with me. According to Clarke and Star, "One of Anselm's great gifts was listening forth stories . . . [and] most everybody, when asked, can tell some kind of story about their data" (p. 346). I offered more than a simple "tell me a story about your data" because for many of the participants, being asked to analyze collected data was a relatively new experience. I turned to the work of Dey (2007) for the language to use.

Dey (2007) proposed that open coding places an emphasis on "stimulating ideas rather than documenting evidence" (p. 85). Dey recommended devising codes that "capture and convey meanings through close examination of and comparisons between different parts of the data" (p. 84). Glaser (as cited in Dey, 2007) recommended general questions such as: "What is this data a study of . . . and what is actually happening in the data" (p. 84)? Dey explained that such simple questions imply that codes and categories can be created in direct response to the data and that "the creative process lies in confrontation with evidence, allowing it to invoke or provoke ideas without any particular preconceptions on the part of the analyst" (p. 85). Before research participants examined the interview data, I asked them to reflect on their raw data and ask themselves (and each other) what are the key ideas, concepts and themes that they see within the data, recording the codes created based on their relationship with their interview data and with each other in conversation about the data.

I planned to respond to participants' analysis using Clarke's mapping processes to "provide ways to compare data, to explore ideas about the codes, and to direct further data-gathering" (Charmaz, 2006, p. 21). Satisfied that I

was well-prepared and that the research design made sense, my dissertation supervisor offered me a green light to go ahead—and I did.

Details About What Happened

In late August of 2009, an email message generated by the Leadership Development Program administration team was distributed to all graduates of the program, on my behalf, informing all graduates and mentors that I was conducting the research with full permission of the Government of Alberta (see Appendix A). I invited participants to a data gathering session to be held in Edmonton on September 23, 2009, and informed them that I would like to gather data from other parts of the province and would be willing to travel. In that email I asked potential participants to visit my research website for more details (Dawson, n.d.). This was my attempt to cut down unnecessary emails between participants and the leadership development administration team. I wanted to handle the logistics and communication without burdening the administrators of the program.

As Edmonton is the capital city of Alberta and the government is headquartered there, I knew that was the location that the greatest number of participants would attend most easily. Within one week I received 62 responses from graduates of the program interested in participating. Not all would be able to attend the September 23, 2009, session but they were interested in participating in some way. Of the 62 responses, 47 were from participants in the Edmonton area, and 15 responses were from graduates from Calgary, Lethbridge, Red Deer, and Spruce Grove.

Data Gathering Session #1 in Edmonton

Participants arrived and there was a flurry of greetings and introductions. The emotions displayed in the room surprised me as participants from over 8 years of the program came together. I wrote in my research journal that night, “Wow. Hugs and handshakes and laughter happening in a government building in downtown Edmonton after work hours all because of a research project. It doesn’t sound normal and it all felt wonderful.”

I explained the intention behind the study. I reminded participants of the voluntary nature of the data gathering session and asked all of them to complete the informed consent form after reading it carefully. I explained the time parameters for the session and described the interview matrix process. I asked one group to volunteer to have their process video-taped so that I could

reflect on their process and learn from their interactions with each other and one group quickly volunteered.

I left the session with flip chart paper that captured each group's analyzed data with their coding complete along with the edits and additions from the larger group. I had the DVD recording of the volunteer group's analytical coding process. Upon returning to my office 3 days later, I typed out the flip chart content and emailed it to the participants who had volunteered to help me analyze it further (see Appendix C). In the next chapter, I offer examples of those initial codes from the Edmonton session and how I categorized those codes in relationship with the codes gathered from different parts of the province.

I watched the video recording three times to learn what the participants had done in analyzing their interview results in order to create the flip charts. In my research journal, on September 29, 2009, I wrote,

They asked each other good questions as they attempted to make sense of what they had heard. The two questions that stood out were, "What did any of you hear that was even slightly different from what is already on the flip?" and "What phrase can we use to capture the theme about this program being a deeply personal journey for so many people?"

The result of this first data gathering session was that I felt comfortable with the choices I had made in inviting the participants to interview each other and complete the first phase of data analysis.

Feedback from Participants of Data Gathering Session #1

One unintended outcome of this first session is that two participants sent follow-up emails suggesting that I might tweak and adapt the questions in order to solicit richer and more varied data. One of these participants also noted,

Karen, I know that you are curious about what good things are coming from this program and I think that is very important to explore. I also know that the program was difficult and demanding for some of us, and those challenges actually made it even more valuable so why don't you ask about that?

Data Gathering Session #2 in Lethbridge

On November 25, 2009, I drove to Lethbridge, Alberta, where a program graduate from Alberta Environment hosted me along with eight participants to conduct another interview matrix data gathering session. The smaller number of participants allowed me to sit back and observe the process more carefully than the larger, louder, Edmonton session. Based on the feedback I had received, I reworked the interview matrix questions and presented them to the Lethbridge participants as shown in Appendix D.

I left the Lethbridge session with eight more flip charts, further convinced that my methods choice was a good one as the participants seemed genuinely pleased to have made the effort to participate. At the close of the session I asked if the questions had been effective, and if they had any recommendations for me before I travelled to Red Deer to conduct the third and final group data gathering group session. The Lethbridge participants said that the questions were provocative and comfortable to answer. Upon returning to my office that night I recorded in my research journal, “Today was well worth the trip. It’s important that I hear from graduates all over the province.”

Data Gathering Session #3 in Red Deer

On January 25, 2010, I travelled to Red Deer, Alberta, where again a program participant, this time associated with Alberta Justice, offered to host the data gathering session. She booked a small boardroom in the Red Deer courthouse, and I arrived with treats, flip charts, and the entire process was repeated with the same questions I asked in Lethbridge (see Appendix D).

It struck me how vastly different each of the professional situations are in which our program participants work. Walking through the cubicles and cramped workspaces on my way to the courthouse boardroom reminded me of the contextual constraints that exist for many of our participants as they practice applying their leadership learning. In Andrade’s (2009) article, he reminded grounded theorists that in order to understand the social world under study and to achieve a convincing explanation, it is important to share participants’ everyday lives with them. Andrade did so by living in community with his participants. It made no sense to actually live with my research participants (obviously), yet there was value in being invited into their workplaces to experience two specific government work environments. I wrote in my research journal that night:

It is all well and good for me to encourage our participants to have open, honest conversations with each other and to go deep with their colleagues—it is so easy to deliver theory. But theory then collides with reality and is not quite so simple. It has to be hard to live this when they are working in tiny cubicles with no privacy that look like rows of chicken coops—this was an eye opener.

I taped all flipcharts to my study wall that night and as I read them I wrote in my research journal, “I see a lot of overlap, a lot of repetition, and some interesting similarities in the lists—likely a sign that it’s time to move ahead and try to figure out what this means.” I consolidated the flipchart data gathered from all three interview matrix sessions, looking for repetition and related codes in order to begin my next level of analysis. This resulted in 132 codes, displayed clearly later in this chapter.

Moving to the Next Level of Analysis

It was at this point that Clarke’s (2005) methods for conducting situational analysis became most helpful. Clarke suggested creating visual maps to present the data in a way that would crack open the complexities within the situation under study: “Because maps are visual representations, they helpfully rupture (some/most of) our normal ways of working and may provoke us to see things afresh” (p. 30). Maps work as devices for making connections and doing relational analyses and they are devices to materialize questions. Clarke wrote, “Mapping opens up knowledge spaces. Maps are . . . devices for handling multiplicity, heterogeneity, and messiness in ways that can travel . . . maps allow unmapping and remapping” (p. 30).

Clarke (2005) offered three different types of maps with which to conduct situational analyses. These maps are not necessarily intended to create final analytic products that will appear in the finished report, and, Clarke claimed, “The major use of them is ‘opening up’ the data and interrogating it in fresh ways within a grounded theory framework” (p. 83). One of Clarke’s stated intentions in offering these three types of maps is to address the problem she calls “analytic paralysis” (p. 84), in which “the researcher has assiduously collected data but does not know where or how to begin analysis” (p. 84). Analytic paralysis is “not supposed to happen” (Clarke, 2005, p. 84) in traditional grounded theory research because data collection, analysis, coding, and memo writing that leads to more data collection all begin at the same time; “but it does happen, for a wide array of reasons, especially but not only among

neophytes, and usually due to fear of analysis and/or fear of making premature and/or ‘erroneous’ analytic commitments” (Clarke, 2005, p. 84). I experimented with Clarke’s three mapping processes, found some aspects very helpful and others not useful within the context of this study. As a neophyte, it felt good to read Clarke’s acknowledgement that even experienced qualitative researchers have found themselves stuck in analytic paralysis. Clarke’s three types of maps offered me a starting place from which to dig into the 132 codes and start making sense of what I had collected from the participants:

Doing situational analyses offers three fresh paths into a full array of data sources that can lay out in various ways what you have to date. These approaches should be considered analytic exercises—constituting an ongoing research workout of sorts—well into the research trajectory. (p. 83)

Clarke (2005) offered three main types of situational maps and analyses:

1. Situational maps as strategies for articulating the elements in the situation and examining relations among them
2. Social world/arenas maps as cartographies of collective commitments, relations, and sites of action
3. Positional maps as simplification strategies for plotting positions articulated and not articulated in discourses. (p. 86)

My first attempts at mapping followed Clarke’s (2005) examples in her book. I began with messy maps by writing all of the 132 codes randomly on a blank sheet of paper. To explore possible relationships among the codes I followed Clarke’s example by centralizing one code and then asking myself how all of the other codes related to it. I wrote memos in my learning journal each time and began to see possible relationships among the codes. There were too many codes, however, for this to be a practical exercise, as I noted in my learning journal: “I need to figure out how to group some of these together now because I can’t do relational analysis with all 132 codes—I need to group them before I work with them further.”

I wrote each of the 132 codes onto separate sticky notes in order to easily move the individual codes into possible categories using my office wall as backdrop. I grouped the sticky notes in a variety of small clusters, taking a photo of each rendition and then asking myself what is the underlying idea

here, and how might I group these differently? The process of moving the codes around was an iterative one that involved looking for the possible relationships among the various pieces of the data puzzle. In the next chapter I offer specific examples of the analytical categorizing and subcategorizing story.

When I finally arrived at categories that made the most sense to me, I wanted to display my thinking visually and transfer my office-sized sticky note map into something reproducible. I wanted fresh analytical perspectives from others to provoke ideas for categories and subcategories I might have missed.

Mind Mapping

I experimented with drawing circles and text boxes with a word processing program until, out of frustration, I searched online using Wikipedia (n.d.) and found FreeMind (n.d.), a mind mapping software product that made it easy to produce my map electronically for others to see.

Mind mapping is a graphic technique that can be applied to aspects of life in which improved learning and clearer thinking will enhance performance, such as in note-taking, brainstorming, memorizing, or analysis (Buzan, 2003). The initial use of mind mapping is rooted in the field of education. There is evidence, however, that researchers are beginning to experiment with their use (Tattersall, Watts, & Vernon, 2007). Buzan (2003) recommended that through a mind mapping process, information is converted into a combination of written, diagrammatic, and graphical representations, allowing related ideas, concepts, and themes to be linked or integrated with each other on both paper and in the users' minds.

This mind mapping concept was an ideal tool to visually represent my analytical journey, and it aligned with what I perceived Clarke's (2005) intention was behind using situational maps. I could easily explore how the codes looked different when a certain code was moved to a new category, looking for fresh possibilities of how they might relate to each other (Charmaz, 2006; Clarke, 2005).

I was already in an experimental mode with the research methods, and I decided to use mind maps as a way to present and help work with the data. As a pracademic, I was eager to incorporate a new tool that would support the analytical process, and contribute to my own development as a practitioner.

Using the Mind Map to Support Next Steps

When the first map was complete, I took it to my dissertation supervisor for feedback, questions, and recommendations for improvement. Sally asked questions that encouraged me to revisit my initial analysis and look at it in different ways. Two specific questions that prompted experimentation were: which of these categories can be collapsed and renamed, and what happens if every category name needs to be a clear answer to your research question? Three experimental renditions of the mind map later, I had a map that honoured all 132 codes generated by participants and was categorized and named in a way that provided an initial, tentative response to the research question (see Appendices E and F). After showing the mind map to four people not attached to the research project and two research participants, I received feedback that the map made sense and was easily understood (see Appendices E and F). The first stage of data gathering and analysis was complete and a detailed description of the analytic process that resulted in the mind map is offered in the next chapter. This mind map would become the scaffolding on which to design interview questions to help build the next level of data gathering and analysis through interviews.

I had a large, poster-sized version of the mind map printed and laminated. Although I sent an electronic version to each interviewee, I thought that having a large hard copy to which to refer during the interviews would also be important.

Preparing for and Conducting One-on-One Interviews

The metaphor that I used for the final version of the mind map was that of a skeleton and it was the one-on-one interviews that would put flesh on the skeleton. The interviews were intended to explore the white spaces on the mind map, fill in the gaps, and solicit new data that would help deepen my understanding of the situation under study. I studied the work of Kvale (1996) and Clarke (2005) to prepare for the interviews ahead.

Kvale (1996) encouraged researchers to clearly describe the interview design (how participants were chosen and invited), the interview situation (what was the social and emotional atmosphere and what questions were asked), the transcription process, the analysis procedures, and the verification of the process (what checks were conducted for the validity of the findings). What follows is my description of the interview process.

I selected prospective interviewees based on information I had collected to that point in the study. After sending out the initial invitation a year earlier, several graduates of the program volunteered to participate in an interview. After each group data gathering session I had collected contact information of participants willing to be interviewed.

I invited interviewees who offered diverse perspectives. I interviewed program graduates representing a diversity of gender, ministry affiliation, number of years since graduation from the program, years of service within the Government of Alberta, and educational background. It was important that every interviewee be a graduate of the program, of course, and I heard from graduates who had played different roles, such as that of a program team mentor and an administrator of the program. Clarke's (2005) approach to situational analysis reminded me that, "rather than focusing on commonalities, we can pursue directions and angles of vision that reveal difference(s) and complexities, heterogeneous positionings, including but not limited to differences in power in situations" (p. 29).

I used Clarke's (2005) social arenas mapping process to articulate the various discourses and collective actors related to the program to help me understand what questions I might want to ask during the interviews to come. Social world or arenas maps focus on collective action and how people do things together. Clarke hoped that social world or arenas maps would help us frame answers to questions about "relentlessly social spaces and places" (p. 110), in which "individuals become social beings again and again through their actions of commitment to social worlds and their participation in those worlds' activities, simultaneously creating and being constituted through discourses" (p. 110). Through creating a social world or arenas map, according to Clarke, one "enters into the situation of interest and tries to make collective sociological sense out of it" (Clarke, 2005, p. 110). Why might a researcher bother investing time in creating a social world or arenas map? Clarke contended, "*The process of producing the map is analytically important in itself*" (p. 116). Clarke believed that even simple representations are enough to grasp the "limited and simplified stories that we can actually tell in an article—or even a book" (p. 116). The process raises the researcher's awareness of the choices he or she is making, consciously or not, about which particular stories the researcher chooses to tell and, once a researcher tries to produce a social world or arenas map, it is difficult to disengage from it.

As a result of creating a social worlds map for this research project, I learned that I had chosen a narrow scope within which to define the situation

of this inquiry. I could have explored several aspects of the situation under inquiry which I chose to ignore—by creating the social worlds map at least my ignorance was now conscious! I could have explored the discourse around what it means to work in the public service, the complexity of navigating the political landscape of a provincial government (especially the relationship between elected politicians and the public servants responsible for delivering services), or the discourse around job classifications in a hierarchical bureaucracy and who is typically eligible for professional development opportunities like leadership development. The creation of this map reminded me that the influences of the program are embedded within a large, complex system and, just as Clarke (2005) indicated, I was now much more aware of the limited story I was telling.

I also attempted to use Clarke's (2005) positional mapping process. Creating positional maps is an approach to illuminating "most of the major positions *taken in the data*" (p. 126) along with absences of positions taken. Positional maps are analytic tools that support the researcher to grasp and represent the positions taken (and not taken) in the discourse and they "represent the heterogeneity of positions" (Clarke, 2005, p. 126). Clarke encouraged researchers to pay attention to the filters through which we all look at situations, in an attempt to see more clearly what might go unnoticed. Clarke argued that "it is difficult to see that which one does not expect . . . [and] it is even more difficult to see that which one does not grasp or understand! And yet even more difficult to hear silences" (p. 127). After playing with positional maps after completing the first mind map, I decided that I either did not understand Clarke's mapping process or that the situation of inquiry did not lend itself to this type of analytic exercise. I did borrow Clarke's positional mapping language and intentionally asked interviewees what silences they noticed in the data and what might be missing that they expected to see. Their responses to my inquiry were similar: most program graduates enjoyed the experience, learned about themselves, and grew personally and professionally over the course of the program and after graduation—what was missing from the data were negative responses to the program experience. One interviewee explained, "If somebody hated the program or didn't see value in it, they aren't going to volunteer to talk with you because they don't really care. That's why you aren't hearing anything negative. Besides, most of us loved it."

Kvale (1996) used a question to begin a section of his *InterViews* book, "How many interview subjects do I need" (p. 101)? Kvale's response to what

he claims is a very common question is, “Interview as many subjects as necessary to find out what you need to know” (p. 101). What I needed to know was how accurately and fully the mind map, in its present state, reflected the perspectives of program graduates about the influences the program had on them. I was not clear how many interviewees I would need in order to reach data saturation, but I knew that I had to start somewhere. I sent email invitations in early August of 2010 to seven prospective interviewees (two in Calgary and five in Edmonton) and received prompt acceptance from all seven (see Appendix G for email invitation). I followed up by sending the interviewees an electronic copy of the mind map along (see Appendices E and F) with the interview questions (see Appendix H) for reflection and preparation.

I generated questions, once again using Kvale (1996) as my key resource (see Appendix H). I conducted seven interviews in total with a diverse group of interviewees. Table 6 provides demographic data for the seven interviewees.

Table 6
Demographic Data for Interviewees

Gender	Age	Ministry	Years Since Graduation	Years of Service
Female	47	Employment & Immigration	6 months	5 years
Male	55	Agriculture	3 years	5 years
Male	57	Environment	5 years	20 years
Female	28	Justice	1 year	3 years
Male	49	Employment & Immigration	7 years	17 years
Female	54	Employment & Immigration	4 years	25 years
Female	47	Employment & Immigration	4 years	5 years

The interviews took place in different locations, depending on the preferences of each interviewee. All seven interviews took place over 2 days, August 12 and 13, 2010.

At the beginning of each interview each interviewee read an informed consent form (see Appendix I.) I reminded interviewees that the interview was voluntary, confidential, and I asked their permission to record our interview. All 7 interviewees signed the consent form.

I used two devices to record each interview in order to ensure a back-up recording in case one of the devices failed. I used my MacBook Pro laptop as one device and a handheld digital voice recorder as the backup.

Each interview began with the mind map clearly displayed on a table between the interviewee and me. I offered a 2-minute explanation of how I had gathered the data through the interview matrix data gathering sessions and created the mind map by analyzing the data. I told interviewees that each interview would last approximately 40 minutes. From my perspective, each of the interviewees seemed relaxed and happy to share his or her perspectives and insight. The only adjustment I made to the format of the interviews happened after the third interview when I asked, just before finishing the interview, “What is your theory about the influence this leadership development program is having on the lives of participants?” The reason I asked the question was in response to the third interviewee asking me, point blank, “Do you want to know what my theory is on the difference this program is making?” My reply was, “Absolutely.” And so, quite by accident, I was prompted to ask the remaining interviewees the same question. It was an unexpected question for each of them and it generated candid responses that added depth to the interview data.

Working with the Interview Data

The interviews took place over 2 days. I took time to reflect on aspects of the interviewing experience that stood out for me. There were three surprises. First, I was delighted by the amount of time each of the interviewees had spent with the mind map before attending the interview. They had taken the time to look the map over carefully and they had thought about the questions I sent. Of the seven interviewees, four had written detailed notes for themselves in preparation for our time together. This brings me to the second surprise, which was the variety of methods each interviewee chose in order to organize his or her thinking. One interviewee assessed each category and subcategory and assigned it a percentage indicating how much that particular category had influenced his experience as a program participant. Those numbers were carefully documented on his copy of the mind map. Another interviewee had written five pages of notes, capturing her key thoughts.

Another interviewee shared that she had made herself a pot of tea and sat with the mind map in front of her, reliving the program in her mind and thinking about how she was different as a result of the experience. The third surprise for me in response to the interviewing process was the overall excitement the interviewees had about being interviewed, their curiosity around what I was learning, and their eagerness to know what the final report might say. I thought they were doing me a favour by offering their valuable time to be interviewed, and they implied that I was doing them a favour by inviting them to share their perspectives. The entire experience was a positive one for me as a researcher. Nobody explained why participating in the interview process was a positive experience for them, only that they were happy to have the conversation and that they looked forward to seeing the results of the research. The data gathered during the interviews is presented in the next chapter, along with a detailed description of how the data were analyzed in order to move the research forward.

What follows here are the steps I took to conduct the next stage of analyzing upon completion of the interviewing process. My first step was to listen to the 283 minutes of recorded interviews. Over three separate sessions I listened, jotting down responses to what I was hearing. After listening to all of the interviews, I wrote in my learning journal,

These folks have confirmed a lot of what is already there in the mind map, and they've helped me understand what might be missing and why. This is helpful in making sense of what's going on here, but I can't say I'm learning earth shattering new insights.

Using MacSpeech Dictate® (2010), I transcribed each interview by listening to the interviews again, one sentence at a time, and by repeating the interviewees' words into the headset. This transcription process took a total of 23 hours, over six different transcription sessions. By slowing down I was able to hear the interviewees differently. I was surprised by the amount of laughter that punctuated the interviews, and I noticed the amount of silence as the interviewees paused to think about things and choose their words. To me this was evidence that the interviewees had taken the process seriously. Kvale's (1996) suggestion that the analysis and interpretation of interview data is best done right in the interview itself served me well. I wrote in my learning journal after finishing the transcription, "It was good to have the time to slow things down and get clearer on what the interviewees were trying to say—too bad I don't always do this in everyday conversation."

Once transcribed, I began analyzing what this new data might mean in relationship to what I had already gathered through the interview matrix sessions and subsequent mind mapping exercise. The mind map created the foundation for each interview, so I looked for anything in the interview data that was new. I used four different coloured markers to highlight four data types: yellow was for a brand new idea, pink was for a different perspective on something already there, blue was for anything that directly conflicted with the mind map, and purple was for anything that deepened a category with a vivid example or story.

I transferred all of the new codes to sticky notes in order to repopulate the original mind map, doing my best to decide in which categories and subcategories this new data belonged. There were sticky notes that did not fit cleanly in the already existing categories. I expected this because I interviewed with a clear intention of filling in gaps and hearing fresh perspectives. I realized that taking the analysis one step further was going to need some rethinking, so I booked an appointment with my dissertation supervisor to share progress and invite input.

Sally suggested I analyze the new data a different way in order to learn what approach would help make things clearest. I had tried to add on to the already existing mind map by transferring the new codes into the categories that existed. This felt awkward, as if I was forcing a neat fit where, in some cases, the new data had a slightly different underlying meaning than the original categories. Instead of making things clearer, this approach was muddying the map.

The second approach was to recode the interview data without making sense of it in relationship to the already existing mind map. I printed off a new set of interview transcripts and started rereading and recoding the data. The results of that recoding are presented in the next chapter, along with the new mind map that I created as a result. As I reflected on the first mind map in relationship to the newly created second mind map, I felt more comfortable that the research question could be answered.

The story about how I conducted the research is done. The journey took time, it took patience, and it took a lot of sticky notes. The next chapter outlines the findings and how I made sense of the data in order to present my theorizing about the influences the leadership development program is having on participants.

Chapter Four: Theorizing

Relating this Research Story to Theatre

David Mamet (2000) shared his perspective on what audiences want to see when they go to the theatre. Act One typically begins with the audience meeting the characters, seeing and hearing who they are and learning about the situation in which the characters find themselves. In Chapter One I introduced the characters and organizational setting involved in this research story.

According to Mamet (2000), Act Two of a play takes us “into the belly of the beast” (p. 38), into a time which is “not the beginning and not the end, the time in which the artist and the protagonist doubt themselves and wish the journey had never begun” (p. 38). This is a time in the story when there seems to be too many questions to answer, confusion dominates, and problems abound. Mamet asked:

How many times have we heard (and said): Yes, I know that I was cautioned, that the way would become difficult and I would want to quit, that such was inevitable, and that *at exactly this point* the battle would be lost or won. Yes, I know all that, but those who cautioned me *could not* have foreseen the magnitude of the specific difficulties *I* am encountering at this point—difficulties which must, sadly, but I have no choice, force me to resign the struggle (and have a drink, a cigarette, an affair, a rest), in short, to declare failure. (p. 40)

I made slow progress throughout this research initiative as I faced choices, asked questions, heard and read conflicting answers, struggled with my own procrastination, and sought to make sense of next steps by reading the literature. I outlined that in the previous chapter to offer insight into the “occasional incursion of the unusual impediment, the unusual turn of plot” (Mamet, 2000, p. 35). There were several times during the past 3 years when I found myself ready to declare failure. Mamet suggested that Act Two of any good play leaves us with one burning question, and the question facing me was, “What does all of this mean and how do I complete this story for my audience?”

The data were gathered and analyzed in an iterative, interrelated process (Corbin & Strauss, 1990). It simply needed to be written down in a clear, concise way. That step was not as simple and straightforward as I thought it would be. Mamet (2000) concurred:

Once the third act is planned, for better or for worse, the play is done . . . the potter has fired the piece. Still, the act has to be written (the pot still has to be glazed), and the dramatist thinks, again, “Oh come on – it’s in my head. Must I go on? Are you really going to make me write it down?” Tiger-by-the-tail, stakes-raised-almost-out-of-recognition . . . the dramatist and the protagonist, facing the third act, are weary. (p. 76)

My Intentions in this Chapter

Weary or not, I wrote this chapter to explain how I analyzed the data. I have intentionally separated this part of the story from the previous chapter to outline the thinking and choices that led me to my theorizing. I agree with Strauss’s (as cited in Clarke, 2005) perspective that, “undoubtedly, the most difficult skill to learn is ‘how to make everything come together’—how to integrate one’s separate, if cumulative, analyses” (p. 136).

Pandit’s (1996) article, “The Creation of Theory: A Recent Application of the Grounded Theory Method,” was helpful. Pandit began his article by describing the vocabulary he chose to use in describing his grounded theory that was to follow. Following Pandit’s format, I offer my interpretation of the situational analysis and grounded theory (and grounded *theorizing*) language used by Clarke (2005) and Corbin and Strauss (1990). I explain the rationale for my analytical choices and offer specific examples of what that looked like in practice. Finally, I share an overview of my grounded theorizing.

Why Grounded Theorizing instead of Grounded Theory?

Over late night conversations with my partner I explained my intentional choice to present the end results of this research as theorizing, rather than as theory. Clarke’s (2005) interpretation of “theorizing” (p. 28) suggested that one’s current understanding of what is going on in any given situation is just that, a current understanding. Clarke proposed that traditional grounded theorists pursue substantive or formal theory, which she views as “a high modernist project, itself situated in an elaborate set of assumptions about the making of sociology as a science parallel to the natural sciences” (p. 28). Clarke cited Denzin’s point of view that “society, like interaction, is an emergent phenomenon, a framework for the construction of diverse forms of social action. *It makes no sense to write a grand theory of something that is always changing*” (Denzin, as cited in Clarke, 2005, p. 28). Clarke pointed out that theorizing “does *not* mean ‘analysis lite’” (p. 29). Along with Charmaz (2006), Clarke argued that avoiding overgeneralization and overabstraction is

key and that the challenge of writing a theoretical text is to present theory “not as objective truth but as a located and limited story . . . to keep theory in play but to redefine theory in a way that keeps the theorist in play” (Daly, as cited in Clarke, 2005, p. 29).

I liked the word play used in relationship to theorizing because it brought fluidity and lightness to an academic vocabulary that is often, from my perspective, experienced as solid and heavy. Clarke (2005) offered the language of “sensitizing concepts, analytics, and theorizing” (p. 29) as alternatives to the word theory and saw these words as more “modest and partial but serious, useful, and hopefully provocative” (p. 29). The term grounded theorizing suited my preferences in presenting my findings.

The Language of Situational Analysis and Grounded Theorizing

I chose Clarke’s (2005) iteration of grounded theory called “situational analysis” (p. 37) to guide my inquiry. What I learned upon beginning the analytic process was that Clarke assumed readers of her book had a thorough understanding of grounded theory language, coding, and categorization procedures, and a solid comfort level with the steps involved in basic analyzing. Clarke warned, “This is not a book for beginners in grounded theory or qualitative inquiry” (p. xxxi). I was, however, a beginner. Clarke (2005) credited Anselm Strauss as being her “superb teacher” (p. xix), so I turned to Corbin and Strauss (1990) for guidance around the grounded theory basics necessary for me to be able to operationalize Clarke’s (2005) approach to situational analysis. First, I explain my understanding of the basics, then I describe how I applied those basics during this research initiative.

Corbin and Strauss (1990) explained that “theories can’t be built with actual incidents or activities as observed or reported; that is, from ‘raw data.’ The incidents, events, happenings are taken as, or analysed as, potential indicators of phenomena, which are thereby given conceptual labels” (p. 7). It was the conceptualization of the raw interview matrix data by research participants that generated the flip charts with which I started my own analytic journey. This labelling or naming process is often referred to in the grounded theory literature as “open coding” (Clarke, 2005, p. 7; see also Charmaz, 2006; Corbin & Strauss, 1990).

The second element of grounded theory that Corbin and Strauss (1990) defined are categories:

Categories are higher in level and more abstract than the concepts they represent. They are generated through the same analytic process of

making comparisons to highlight similarities and differences that is used to produce lower level concepts. Categories are the “cornerstones” of developing theory. They provide the means by which the theory can be integrated. (p. 7)

Categories are developed by the researcher and are made up of concepts that appear to pertain to the same phenomenon. The concepts may be slightly different in form but, as Corbin and Strauss (1990) noted, “they seem to represent activities directed toward a similar process” (p. 7). Corbin and Strauss suggested that simply grouping concepts together under a more abstract heading does not necessarily constitute a category. Corbin and Strauss wrote, “To achieve that status . . . a more abstract concept must be developed in terms of its properties and dimensions of the phenomenon it represents . . . and the consequences it produces” (pp. 7–8). Once a category is developed, the researcher must pose questions and seek more data by exploring out in the field in order to develop a more thorough understanding of the possible characteristics of that category. Eventually, “through such specification, categories are defined and given explanatory power. Over time, categories can become related to one another to form a theory” (Corbin & Strauss, 1990, p. 8).

Corbin and Strauss (1990) argued, “If one does not alternately collect and analyze data, there will be gaps in the theory, because analysis does direct what one focuses upon during interviews and observations” (p. 13). As the researcher collects and analyzes more data, eventually there will be an opportunity to analyze the developed categories to get clearer on a core category:

The core category represents the central phenomenon of the study. It is identified by asking questions such as: What is the main analytic idea presented in this research? If my findings are to be conceptualized in a few sentences, what do I say? What does all the action/interaction seem to be about? How can I explain the variation that I see between and among the categories? The core category might emerge from among the categories already identified or a more abstract term may be needed to explain the main phenomenon. The other categories will always stand in relationship to the core category as conditions, action/interactional strategies, or consequences. (Corbin & Strauss, 1990, p. 14)

One exception I took to Corbin and Strauss’s (1990) explanation above is their use of the phrase “the core category might emerge from among the

categories” (p. 14). Things do not simply emerge during qualitative research. I, as researcher, am relating with the data throughout the entire process, and I play a pivotal role in what emerges and how it emerges. I am making (hopefully) mindful choices each step of the way. As Clarke commented after reading a draft of Corbin and Strauss’s article, “at this stage one can commonly confront several [analytical] schemes that can link it all together. Then one must choose among them that which best captures the whole shebang” (Clarke, as cited in Corbin & Strauss, 1990, p. 14). Upon reading Adele Clarke’s (2005) response to the draft of Corbin and Strauss’ (1990) article, the themes and ideas she presented in her book, *Situational Analysis*, published 15 years later, came into sharper focus.

I realized more fully the contribution Clarke (2005) has made to the development of grounded theory as I reflected on her acknowledgement that “there is an ever-deepening recognition of the always already political nature of the practices of research and interpretation” (p. xxvii). Clarke asserted that many contemporary scholars have “questions of the legitimacy and authority of both research and researchers and [about] de/repositioning the researcher from ‘all-knowing analyst’ to ‘acknowledged participant’ in the production of always partial knowledges” (p. xxviii). The focus of her book was to offer practical tools and methods and “ways into” (Clarke, 2005, p. xxii) the data, to support researchers to analyze rigorously and to be mindful of the assumptions and biases we bring to that analytic process.

What follows is the story of my analytical journey. I learned from Corbin and Strauss’s (1990) explanation of grounded theory, and Clarke’s (2005) maps helped me navigate during the journey. I adapted some of her ideas, and without them, I would have felt lost.

The Analytical Journey Towards Theorizing

It is impossible to understand fully how I carried out the analysis and theorizing. As Corbin and Strauss pointed out, “The readers are not present during the actual analytic sessions, and the monograph does not necessarily help them to imagine these sessions or their sequence” (p. 17). What I can do is to describe my analytical steps as accurately as possible, and describe how I made meaning of the data in order to move towards theorizing. Clarke (2005) recommended that final products using mapping approaches should offer readers aspects of “the big news” (Park, as cited in Clarke, 2005, p. 142) along with some close-up views. I aim to offer both.

Grounded Theorizing – One Step at a Time

The first data gathering sessions included research participants completing the open coding of the raw data themselves during the interview matrix process. The participants then collaboratively compared the results of their open-coding process in order to group similar coded incidents together and give each one a conceptual name. The participants then listed the conceptual names on flipcharts for me to take away.

Appendix C displays the flip chart data from the first interview matrix session in Edmonton, organized by the four questions that guided the data gathering session. Some of the conceptual names assigned by participants were quite specific, while others were more general. In response to the third question, for example, about the influences the program had on personal lives, participants offered better communication with children (18–32 years), less family conflict by having family participate in discussions, and more comfortable physically, emotionally, mentally. The difference between specific labels and broader ones was clear throughout the flip chart data. In response to the question about how the program influenced participants professionally, the conceptual labels included job advancement, involving others in decision making, all the way to a more general response of having the feeling of being a better person. One question that surfaced in analyzing this first set of flip chart data was how participants decided the difference between personal and professional influences. One conceptual label, for example, included as a personal influence having pursued another career path in following the leadership model.

One of the Edmonton research participants looked at the flip chart data (see Appendix C) and suggested that trying to discern the difference between professional and personal influences of the program might create artificial and unnecessary challenges in the analytical process. His email stated, “I think you will analyze yourself into a hole if you commit to discerning the difference. The way I see it, we are whole people and if we are influenced personally it will impact our professional role and the opposite is true too. When you start blending all of our responses, try blurring that line” (Research Participant, personal communication, September 29, 2009).

I collected more flip chart data from each of the next two interview matrix sessions and combined and consolidated all of the conceptual labels in order to honour all that the research participants had offered. Some of the labelled concepts remained very close to how they appeared on the original flip chart. One example of that is “happy mentally, emotionally, physically”

(see Appendices E and F), which retained similar language. Some of the labelled concepts were renamed in order to represent the meaning of similar codes. A specific example of that is that the flip chart data indicating better communication with children (18–32 years) was rolled up into a label called “helped me with parenting” (see Appendices E and F).

My next step was to reflect on the participants’ 132 labelled concepts and begin to look for connections and relationships among them that would help answer the guiding research question. As described in the previous chapter, I used sticky notes to visually map possible groupings and relationships. The simplest way to describe how my thinking shifted as I experimented with a variety of groupings is to share how the names of the categories changed with different approaches to organizing the sticky notes. After the first attempt at grouping the 132 labels, for example, the categories were named as follows: highlights of experience, life connections, it’s engrained, learning about self, hard and negative aspects, create dialogue, Kouzes and Posner model, appreciation for others, hypocrisy of managers, hoping for..., shifts in thinking, wanting to take program, feedback, post program connectivity, positive feelings, all levels, different angle on problems, part of bigger life experience, diversity, and building relationships. The 132 codes were categorized based on these 21 category names and were presented in my first attempt at a mind map. In response to the map, Sally suggested reducing the number of categories, renaming them, and then analyzing them carefully “with a fine tooth comb” (S. St. George, personal communication, May 28, 2010) ensuring the category name reflected each of the labels contained therein. Back to the sticky notes I went.

The next rendition of the map featured the following category names with, once again, the 132 labels organized accordingly: created positive feelings, grew awareness and appreciation of others, created shifts in thinking, I wanted to take it, helps me build and maintain relationship with others, took action and accomplished things personally and professionally, improved dialogue skills, challenged and stretched participants, learned about myself, program connects to whole life, experienced variety of learning opportunities. I had moved from 21 categories to 11 and I asked for feedback on this second version of the mind map.

In response, my dissertation supervisor provided the question that cracked things open for me to move forward: how might the names of each of the major categories be worded in such a way that they formed an answer to the research question? This was the tipping point for me in understanding how

all the time invested in exploring the categories and their relationships to one another was helping lead me closer to being able to tell my research story. I already had the research question placed in the centre of the mind map, and now I understood that the name of each category (and subcategories) should be a direct and clear answer to the question. This realization allowed me to look at the sticky notes with new eyes, to reflect on how the categories might express a clear response to the research question, and to consider larger categories within which subcategories could support and enrich the main ideas. I created the final version of the mind map that helped me generate an initial story about how graduates of this leadership development program perceived themselves to be influenced by their participation in it.

Pandit (1996) proposed that a research story “is simply a descriptive narrative about the central phenomenon of study” (Data Analysis Phase section, para. 9). Now that I was able to name the major categories, I used the mind map as my starting place for telling the first, rather tentative, rendition of the story.

The mind map that I created based on my analysis is featured in Figure 3 and Appendices E and F.

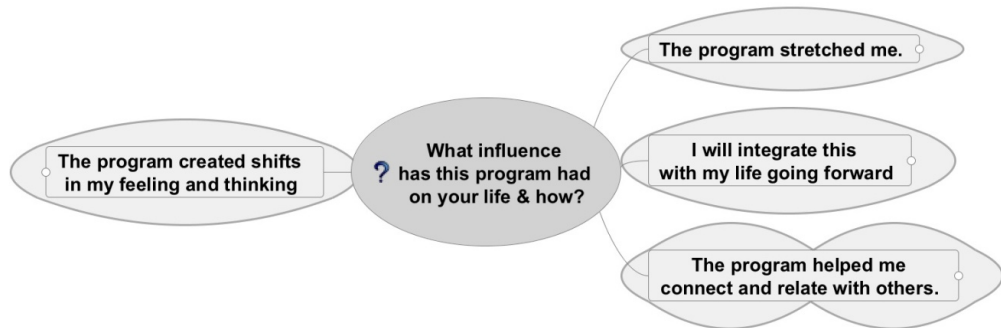


Figure 3. The first mind map collapsed into its most basic version.

Note. Each of the categories shown above contains several subcategories that are featured in Appendices E and F.

Translating the Mind Map into a Story

The data as analyzed indicated to me that the Leadership Development Program was providing an opportunity for participants to shift their thinking and feeling about themselves, their organization, the phenomenon called leadership, and about other people. Though often challenging, the program offered participants chances to try new and different experiences and helped

them connect and relate differently with others in both their personal and professional lives. Many participants shared that the program was part of an ongoing life journey and integrated their program experience as they moved forward.

I looked through my learning journal as I reflected on the mind map in preparation for the next round of data gathering that would happen through one-on-one interviews. Corbin and Strauss (1990) noted the importance of writing notes and memos throughout the analytic process:

Writing theoretical memos is an integral part of doing grounded theory. Since the analyst cannot readily keep track of all the categories, properties, hypotheses, and generative questions that evolve from the analytical process, there must be a system for doing so. The use of memos constitutes such a system. Memos are not simply “ideas.” They are involved in the formulation and revision of theory during the research process. (p. 10)

As I looked through my journal and at the mind map, I found three surprises. Clarke (2005) claimed that she is “always very happy when a student discusses being surprised at some outcome because it usually means they are working very hard analytically, confronting themselves as well as the data in seriously reflexive ways” (p. 141).

The first surprise that I noted was the limited discussion about the range of levels of the hierarchy represented within the program. In my experience, the invitation to all levels of an organization to participate in a leadership development initiative is rare. In this program, subtitled *Leadership from the File Room to the Board Room*, government employees at any level of the job classification hierarchy can apply to participate. There were only 2 of 132 categories that related to this relatively unique aspect of the program, and I expected there would be more. This was an area worthy of further exploration in my opinion, and I was interested in asking the interviewees about their perspective.

The second surprise for me was the positive and negative interpretations of very similar incidents. Disappointment with mentors, in some cases, resulted in participants learning and growing in confidence as they worked together with their teammates to negotiate with their mentor, and in one case actually fire their mentor. This was recorded as being a highlight of the program that led to increased confidence as they stretched their leadership capacity to tackle a situation that was challenging and uncomfortable. In another similar incident, a perceived as less-than-optimal mentor had a

detrimental effect on a participants' overall experience. Contradictions like these surfaced in other places as I reflected on the relationships among categories and subcategories within the mind map, leading me to believe that these contradictions were a natural aspect of the inquiry.

The third surprise was the importance placed on learning a new leadership vocabulary and language. This was a category that I had not expected, and I was surprised by the specificity with which six conceptual labels addressed how graduates spoke differently after graduating and how easy it is to recognize a program graduate, simply by listening to the language she or he uses. I wanted to increase my understanding of this area during the interviews that lay ahead.

Each of these surprises helped me get clearer on what questions to ask as I prepared to go back out into the field to conduct one-on-one interviews. As the cliché goes, “we don’t know what we don’t know,” and I knew there were more surprises ahead. The mind map offered a wonderful starting place, and I now saw the beginning stages of my analytical journey taking shape. As Dan Wulff (personal communication, June 3, 2010) observed, the mind map was just a skeleton, and my next step was to conduct interviews that would elicit fresh data to help me make sense of the surprises I had noted. The interviews would help fill in gaps by putting flesh on the bones of the skeleton.

Analyzing the Interview Data

I explained the procedural steps I took in analyzing the interview data in the previous chapter. Here, I will share my thinking that led me to once again create a new mind map to visually hold the results of my analysis. I present the entire mind map in Figure 4, followed by the folded-down version of the map in Figure 5 showing only the major categories. Then I will explain how I created this mind map.

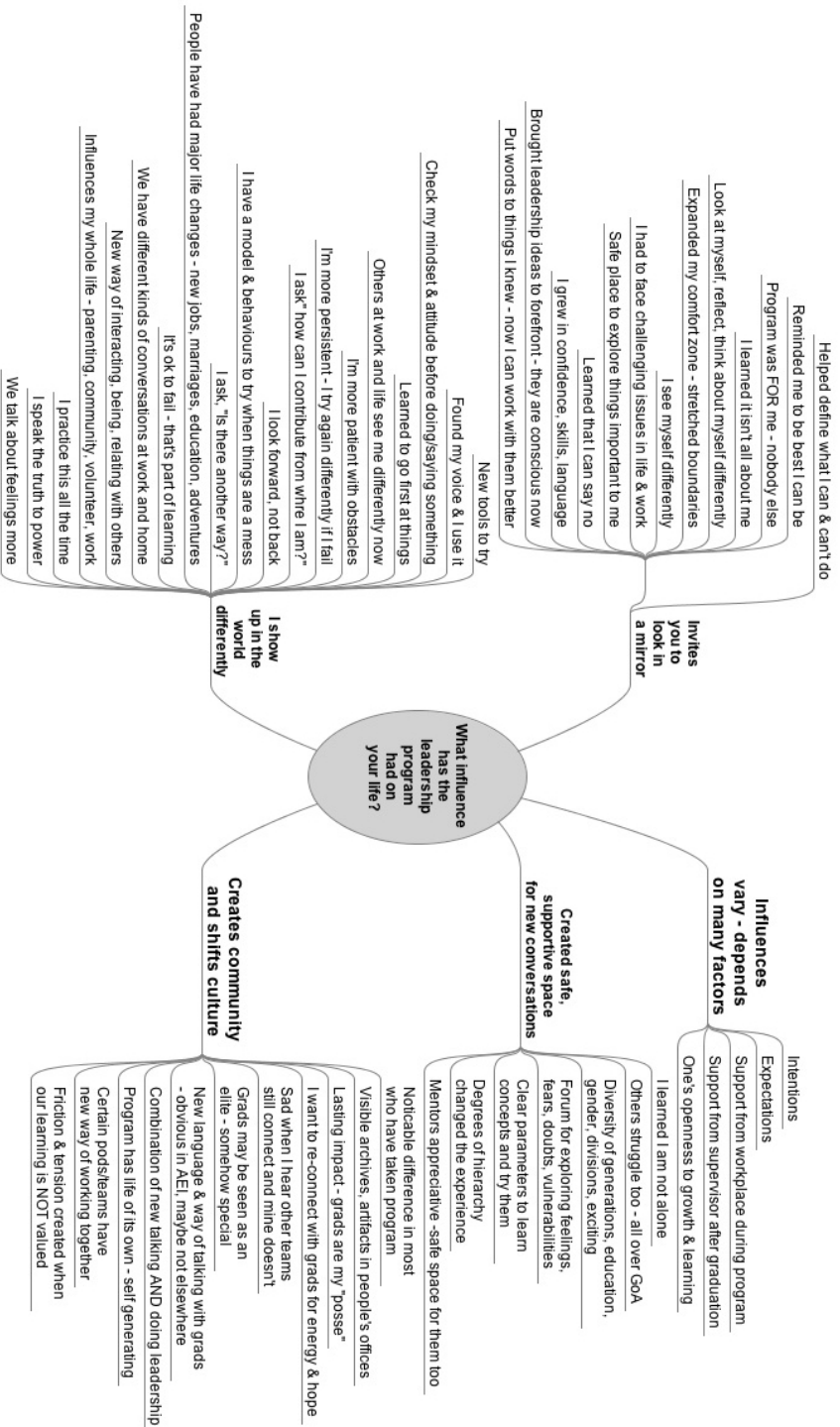


Figure 4. This is the entire second mind map created from the analysis of the one-on-one interviews in its fully expanded version.

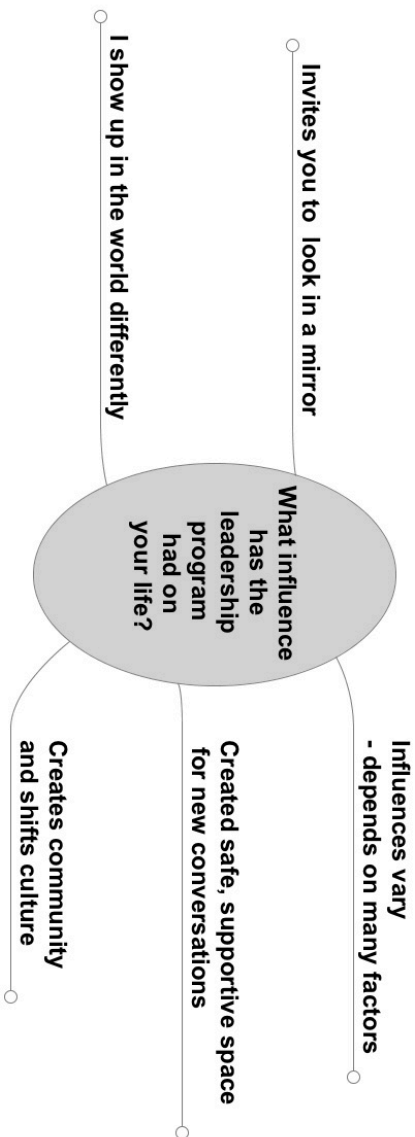


Figure 5. The second mind map collapsed into its most basic version.

I analyzed the interview transcripts twice, each time with a different focus. The first time I focused on coding the interview transcripts in relation to the first mind map, very intentionally looking for fresh insights that either contradicted what was in the original mind map or that offered me a new perspective not yet represented on the map. I was comparing the coded interview data to what I had already analyzed, hoping to add flesh to the existing skeleton. As I reported in the previous chapter, this became a frustrating endeavour as I quickly realized that the interview data did not neatly fit into the existing mind map. I recorded the following in my research journal: “Some of these new codes are going to blow my map to smithereens. Relating them to what’s already there feels forced—I wonder if I need to re-jig the whole thing and start from scratch?” I turned to my dissertation supervisor for guidance, wondering if I was going to have to return to square one and begin again in order to build a completely new map.

Sally suggested that I honour the original mind map by letting it stand on its own and that I go back through the interview transcripts and code them as if I were starting fresh—something I had not considered. I was operating from the assumption that I needed to build on and from what was already analyzed and presented in the original mind map. As I re-read the interview transcripts with fresh eyes, it became easier for me to let go of preconceived ideas of what sorts of codes I should be looking for. As I relaxed into the open coding process, I played with Corbin and Strauss’s (1990) approach to breaking down the interview data into concepts by asking simple questions such as what, where, how, when, and why, in order to “fracture the data” (p. 13). I was then able to group the labelled concepts into 55 categories by comparing them with each other looking for similarities and differences. I used my sticky note method of writing each category on a separate sticky note in order to move them around my office walls, looking for how they might relate with each other. Corbin and Strauss (1990) acknowledged that “a researcher may inadvertently place data in a category where they do not analytically belong, but by means of systematic comparisons, the errors will eventually be located and the data and concepts arranged in appropriate classifications” (p. 13).

Building on what I learned from creating the first mind map, I needed to look at the 55 categories and analyze how they related to each other in order to determine subcategories within major categories. I was one step ahead this time, because I now knew that the major categories would be worded as answers to the overarching research question. This was a huge help to me as I

looked at how the 55 categories might be grouped together to lead toward more abstract major categories. Here is an example of how that process actually unfolded.

As I looked at the 55 categories, one possibility was that the influence the program had on participants was greatly influenced by many factors, many beyond the control of the program facilitators and administration team. As I looked at the categories on the sticky notes, the five that seemed related to that idea were: (a) differing participant intentions in registering for the program, (b) differing expectations about the program before and during participating, (c) the support they received (or did not receive) from their workplace during participation, (d) the support they received from their direct supervisor after graduating from the program, and (e) their own level of openness to growth and learning. Each of these five subcategories seemed to specify various influences on participants that would impact their experience of the program. You can see, on the mind maps shown in Figures 4 and 5, how those five subcategories were grouped together leading towards the more abstract major category that I named the “Influences vary – depends on many factors” category.

As I considered different ways of grouping the categories together by moving the sticky notes around the wall, I would take a photograph of the sticky note configuration, print the photo, and write memos in the margins of the photograph to record my thinking that led me to group them in that particular way. Eventually, after three different sticky note configurations, I arrived at the major categories for this second mind map.

A Brief Sample of the Interview Transcripts

I have chosen what I consider to be striking excerpts from the interview transcripts that exemplify the perspectives that I heard from interviewees. These are specific examples of the raw interview data that I analyzed in order to create the 55 codes featured in the second mind map. Using the five major categories developed in the mind map (see Figure 4), I will share one interview excerpt from each.

From the category labelled “Influences vary – depends on many different factors” one interviewee remarked:

So there is this question for me about what were people’s expectations of the program, and then how closely were their expectations met, like did they understand the intent? Did they even get what the program was about before they signed up? A few people never really understood

that we were supposed to be open—you know—curious about things. They signed up because they thought they should, or some people were actually told to go. So I don't know how we'll ever really know exactly why, but it's sure not transformational for everyone.

An interview excerpt that supported the category “Created safe, supportive space for new conversations” came from a different interviewee:

Our team was open and we talked about all sorts of issues. We talked about things, dilemmas we were facing, different situations, and what as a leader we might try to do to help move things forward better. And we talked about everything—personal issues about our families and kids and even our husbands and wives, and then we tackled tough work stuff too. We could say anything to each other and know that it was ok. Hm. Anything. It always felt safe—that's rare.

For the category that I named “Program creates community and shifts culture” I have chosen to feature this rather long interview excerpt that suggests several different ideas. As I analyzed this passage during the initial open-coding process, I labelled six different concepts within it: ideas live on, postprogram connection, continuing conversations, shared language, want support to reconnect, and program lives on:

Most of us who graduate seem to keep the ideas front of mind. I really think it's partly the follow-up components that seem important because we keep talking to each other about, you know, leadership ideas. And I think it was grads who really pushed and encouraged for some sort of support after graduation—there were little groups of people informally meeting and reading books together and learning, talking, wanting to keep the energy going. We liked talking to each other, right? We had a new language that we could all speak, right? So people had some good ideas that they were willing to share and they were asking for help to keep that going. Very grassroots. I think this program actually has a life of its own.

One interviewee spoke candidly about the personal learning and growth that occurred for her through the program, and this excerpt connects directly to the category “It invites you to look in a mirror”:

I learned that I am a yes person and I don't know how to say no. I said yes to everybody. It's true. And that was killing me. And I am learning better now how to say no. I figured out that I have to explain why I say no because people deserve to know why—I still care about the person and I still want to help them out—but I have to say no. Be sort of tough

and loving, all at the same time, you know what I mean? I had to be really honest with myself that my yes habit was making me miserable. The program forced me to notice that.

The final major category named in the mind map is called “I show up in the world differently.” The excerpt I have chosen to illustrate this category came from the final interview I conducted:

It took about two months of noticing this tension before I finally sat us all down and said, “We can’t go on like this.” And having gone through the program a few years ago, it made me at least go and look at it in a different way. I wasn’t authoritative, which I had the power to be. I could have said, “This is the way it’s going to be—like it or lump it.” I said, “Let’s hear your point of view from both of you, and decide how we can handle things differently.” I can’t jump and cry with joy that it is perfect now, but I feel okay about things. We managed to move things forward. I’ve changed a bit, and I’m an old guy. The program made a difference. Can you believe it?

My intention behind sharing these excerpts from the interview transcripts was to enrich the description of the categories and to offer insight into the actual words of the research participants. It was tempting to offer more verbatim examples of the interviewees’ words because I found their stories compelling. My natural tendency was to share more examples of what I considered to be clear evidence that my analysis accurately reflected the research participants’ experiences. As Corbin and Strauss (1990) explained, although some qualitative methodologies result in thick, rich examples of participants’ actual words and vivid representations of their stories, the products of qualitative research initiatives are not all identical in type or appearance. Some researchers aim at “producing rich descriptions, ethnographic fact-finding accounts, narratives that yield *verstehen*, theoretical analyses of particular phenomena, systematic theory, or politically intended consciousness-raising documents” (Corbin & Strauss, 1990, p. 3). I was committed to grounded theorizing and producing a theoretical analysis of a very particular phenomenon (namely one leadership development program).

Presenting my Theorizing as an Image

Once the new mind map was created based on my analysis of the 55 categories (see Figure 4), I questioned my next step in my learning journal:

I have two different mind maps. They aren’t completely different, but they’re definitely different. Now what? The first one was built based on

participants' coding and analysis and this new one is based on my own coding and analysis, and I used their work as my starting place to go out and interview—so whose do I privilege? Who's to say my map is better than their map? I need to look at both together and sit with this for a while to see how they connect to tell the story.

I was stuck thinking about the two maps from an either-or perspective. I needed to relate to the situation the way an improviser would. Poynton (2008) wrote, "Improvisation is based on 'and' thinking" (p. 239). The stance from which improvisers perform encourages one to notice, accept, and work with what is already there, not to ignore or block it from being part of the ongoing story. Poynton (2008) assured readers that adopting a "yes, and . . ." (p. 239) approach does not mean that one has to completely abandon the idea of detailed planning or analysis. Poynton suggested that military generals realize that their plans will not survive first contact with the enemy, yet they still make them. "If you are able to 'sense and respond' to what needs to happen beyond the plan, the plan itself will still serve you" (Poynton, 2008, p. 239).

It was my turn to sense and respond to my two mind maps. It was time to think about a core category and to ask myself, "What seems to be at the centre of all of this?" As Strauss and Corbin (1990) pointed out, "The core category must be the sun, standing in orderly systematic relationships to its planets" (p. 124). As I looked at the two mind maps side by side, I began making sense of what the core category might be, and to think about how the other categories might relate to it.

The sticky note approach to playing with the relationships among the categories had worked well for me to this point and so I returned to that method. Each time I rearranged the sticky notes I would take a picture (Clarke, 2005); this allowed me to make note of the relationships that I saw between and among the major categories. It became clear to me that, based on Corbin and Strauss's (1990) advice, I needed to ask myself, "What does all the action/interaction seem to be about" (p. 14)? As I looked at the categories on the two mind maps, I wanted to keep at the top of my mind that "the other categories will always stand in relationship to the core category as conditions, action/interactional strategies, or consequences" (Corbin & Strauss, 1990, p. 14). Corbin and Strauss encouraged researchers to diagram the categories in order to visually represent the possible relationships. The theorizing that I present in Figure 6 had been building gradually, I am aware of that. However, it was not until I played with all of the mind maps and the various maps I had

drawn from the beginning that I saw how the many, varied ideas seemed to connect.

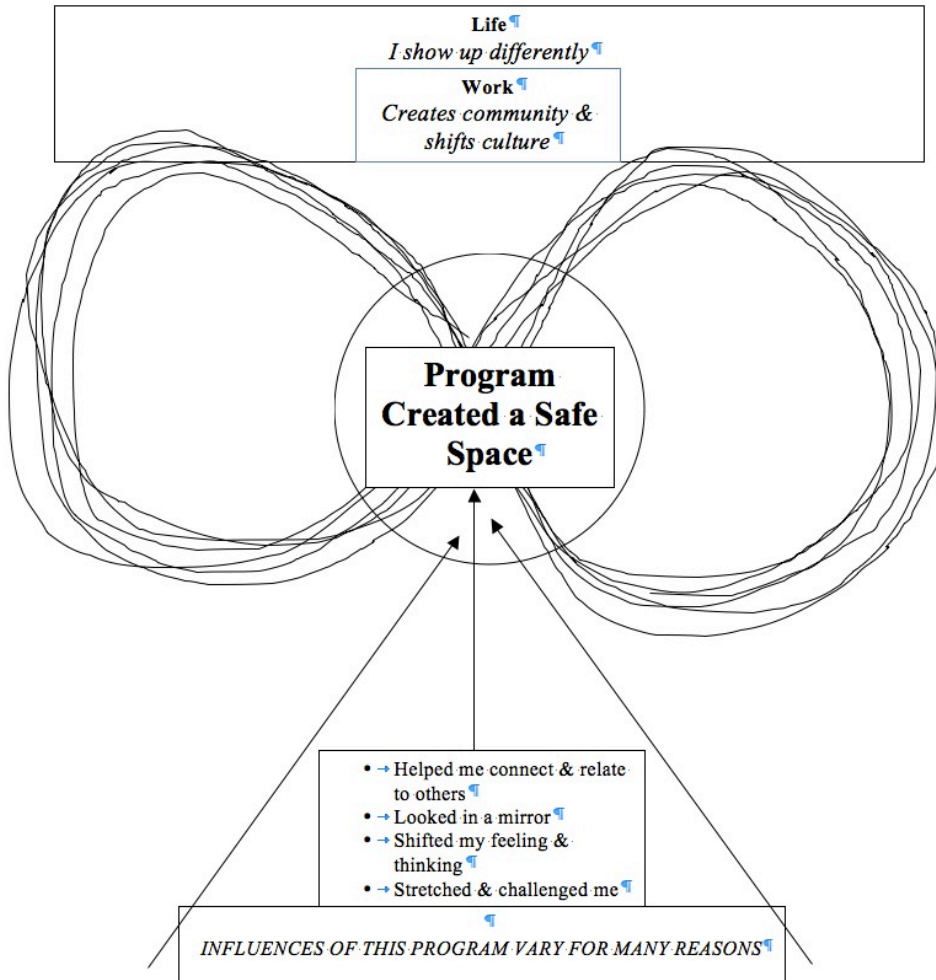


Figure 6. A visual representation of my theorizing created by exploring the relationship between both mind maps.

A Written Summary of the Image

Gergen and Gergen (2004) explained that “most scientific research is communicated to peers through written reports” (p. 76). The written word is important, of course, and I realized upon looking at Figure 6 above that it needed to be interpreted into language form. I have attempted to use simple

language to describe how I created the image and what the image means to me because, as Gergen and Gergen argued, for anyone outside of a researcher's community of practice, research reports are "often difficult to read and even those within communities often find them overly complex and boring" (p. 76).

Hoping to be neither complex nor boring, I present here a written summary of the image. I begin with a general statement about the image's style and appearance, next I tell the story of how I created it, and then finally explain what the image is meant to symbolize, starting from the bottom of the image and moving toward the top.

The drawing appears rather messy, and that is intentional. Leadership development as it occurred within (and as a result of) the program studied did seem messy to me, and was not described by research participants as a neat or tidy phenomenon. It was this observation that led me to create this image first by hand, on a large piece of poster paper. I stood in my office, surrounded by several copies of the mind maps that I had created, in front of a blank piece of paper with one purple felt marker in hand. I tried to turn my thinking brain off (for me that is always a pleasure), I played Latin guitar music, and asked myself what all of this data analysis might look like in a picture. The drawing came quickly, in less than 5 minutes. The lines around the words were hastily sketched and crooked, the words themselves came directly from the mind maps taped to the office walls surrounding me, the infinity loop in the middle of the image spilled off the end of my felt marker in a flurry, and the arrows came flying in from the bottom of the image near the end of the 5 minutes. Finally, the boxes at the top including the words, seemed like a grand finale that completed the image. I remember taking a deep breath, capping the felt pen, and stepping back from the drawing thinking to myself—well, there it is.

As I reflected on the newly created image still taped to my office wall I wrote in my research journal: "I tried not to think too much and just draw from my gut. Is that the right way to do this?" I was reminded of Keith Johnstone's (1983) perspective that to create something new one needs to invite our often critical, intellectually-oriented gatekeeper to step aside: "In the case of the creative mind the intellect has withdrawn its watcher from the gates, and the ideas rush in pell-mell, and only then does it review and inspect the multitude" (p. 79). As I reviewed and inspected the multitude of lines and words scribbled on the poster paper, I wrote in my research journal: "This looks pretty simple and obvious to me. Have I screwed up? What if I can't come up with anything exciting and new?"

It was the word obvious in the learning journal that triggered my memories of learning to improvise at Loose Moose Theatre in Calgary many years ago. The acting coaches often directed actors during rehearsal to be obvious (as opposed to trying to be brilliant or entertaining), echoing the perspective of Keith Johnstone (1983):

The improviser has to realise that the more obvious he is, the more original he appears. I constantly point out how much the audience like someone who is direct, and how they always laugh with pleasure at a really “obvious” idea. Ordinary people asked to improvise will search for some “original” idea because they want to be thought clever . . . ask people to give you an original idea and see the chaos it throws them into. If they said the first thing that came into their head, there’d be no problem. (p. 88)

As I reread Johnstone’s (1983) passage above, I gave myself permission to let my drawing be obvious. The image (and my theorizing that it attempted to illustrate) did not seem original or clever. If, however, if Keith Johnstone’s advice to improvisers had value (and as an improviser I did find his direction valuable), perhaps I could apply it here. What follows is my written summary of what seemed obvious to me as I created the image above.

The arrows that move from the bottom of the image upward intentionally drive towards the centre from various directions, symbolizing that participants entered the program from a variety of backgrounds, for a variety of reasons, and with varying levels of support and encouragement from their peers and supervisors. The diversity of the participants’ backgrounds added richness to the program experience, and it also helped me understand at least some of the reasons why the influences of the program were different for different graduates.

Framed at the bottom of the image, in block letters, I offered a written reminder that the program’s influences varied for many reasons. The reasons were impossible to document accurately given the scope of this research initiative, although several possible reasons for the variations in program influence surfaced in the data. This statement placed at the base of the image, I hoped, would serve as a clear reminder that this program’s design and delivery is not a magical formula for extraordinary leadership development. The influences on participants did vary, and there were indeed participants for whom the program did not seem to make a positive difference in their personal or professional lives. By placing this message at the base of the image, I hoped to ground the rest of the model with the acknowledgement that the program

under study is not perceived by me as a guaranteed solution to every organization's leadership development challenges.

The movement of the arrows from the bottom of the model toward the centre of the image also signified that participants came from all levels of the government hierarchy—from the file room to the board room. This program was not designed specifically for senior members of the organization, even though they were most welcome to participate. The arrows are drawn at slightly different lengths and begin at different levels of the image to symbolize the mixture of roles and positional levels represented among the research participants.

It was the program's creation of a safe space that became the core category to which all other categories related and this is why I chose to draw it with strong, bold font right in the centre of the image. The circle around the bold font symbolized a shape that I relate to storytelling, community, and safety. My choice to use a circle in the middle of the image comes from my experience of theatre, improvisation, my years as a teacher, and sitting around camp fires as a child—in each of those situations forming a circle, from my perspective, created opportunities to play, listen, and learn collaboratively. As I thought back to the typical arrangement of the classrooms in which we delivered the program, participants sat in circles or around tables to facilitate conversation.

The program that formed the basis for this research initiative created a safe place in which participants came together in a structured, facilitated environment to learn about, talk about, and practice the phenomenon called leadership. What the program did, based on the analyzed data, was to invite conversations that the participants would not have experienced without participating in the program.

What happened within the safe space featured at the centre of the image, is captured in the box below it—it was these categories of activities that research participants talked about as they reflected on the program's influence. Over the course of 18 months, participants met other government employees from many levels of the organizational hierarchy and from a variety of ministries which gave them opportunities to practice connecting and relating with those from a diversity of personal and professional backgrounds. Participants were invited to look in a mirror, metaphorically speaking, and reflect on their own habits, beliefs, strengths, and possible areas for growth and development. This invitation to reflect stretched and challenged

participants as their thinking and feeling shifted—about themselves, about other people and their relationships, their organization, and their personal lives.

The infinity loop that stretches across the centre of the image, symbolized to me the constant movement and never-ending learning journey to which many research participants referred. Not only did they move in and out of the program over the 18 months, which offered them chances to apply and test their learning, they acknowledged that the program was only one aspect of their own growth and development. There was a lot of development happening away from the program, and the program experience created for them a safe space in which to make meaning of what was unfolding in their personal and professional lives outside the program.

As a result of the program experience, many participants believed that they show up differently in their personal and professional lives and that the program has given them new language with which to talk about leadership. As the research participants were all graduates of the program, the boxes at the top of the image were meant to illustrate that the program still influenced them in some way. I was especially interested in the symbolic meaning behind the intersection of the infinity loop and the boxes at the top—the graduates have continued to move and take action, just as they did when they were participating in the program. Many program graduates reported experiencing a sense of connectedness to others who have participated in the program. The research participants talked about having new language with which to talk about leadership, and they easily recognized fellow graduates of the program simply by the way they show up in conversations.

The work box was intentionally embedded within the larger life box, and to me this was a key idea worthy of representation. Research participants consistently talked about the leadership learning being just as valuable at home as it was at work, and that the program influenced them as much personally as it did professionally.

From bottom to top, I have offered my interpretation of Figure 6 and how it illustrates how I made meaning of the answer to the guiding research question. As I reflected on the image, I needed to ensure that it would stand up to scrutiny by going back into the mind maps that held the data (Clarke, 2005; Corbin & Strauss, 1990). With all mind maps and the newly created image still taped to my office walls, I could compare them all with each other. I found myself nodding my head as I looked back and forth from the maps, to the image. Everything fit, and, returning to my improvisational Keith Johnstonian (1983) roots, it all seemed rather obvious.

Chapter Five: So What and Now What?

A Collision Between My Practice and This Research

Within my professional practice, I often rely on the work of Dorothy Strachan (2001) whose writing offered me the valuable questioning framework: “What – So What – Now What” (p. 68)? This simple questioning framework has helped invite clients into the conversations they need and want to have in order to do just that—move forward together effectively. Strachan suggested that the three questions are interdependent and that it does not matter in what order one asks the questions, as long as all three are explored “using the order that makes sense for a particular situation” (p. 68).

What questions are important because they raise awareness and invite respondents to reflect on what they noticed. The last chapter was my answer to what I noticed in the collected data. Those analyzed and organized noticings led me to create an image that represented my theorizing in visual form, along with a written interpretation of the image.

It is time to answer the questions so what and now what, just the way I would ask a client to do. To move forward effectively, I needed to follow the same simple questioning protocol.

Introduction to the Shape of this Chapter

In order to contribute to the ongoing scholarly dialogue about leadership and its development within organizations, I explore the importance and relevance of my theorizing to provide answers to the “so what” question. The venture will have been a waste of time and effort if this dissertation does not add to existing understanding about leadership development.

Strachan (2001) stated that “the ‘So What’ part of the question framework asks people for their opinions about how things fit together” (p. 73) looking for connections and relationships among all they have noticed. This relational approach to making meaning aligned with social constructionist scholars whose ideas had informed my research choices all the way along (Anderson et al., 2006; Barrett & Fry, 2005; Gergen, 1994; Gergen, 2009; Gergen & Gergen, 2004; Hosking & McNamee, 2006).

Strachan posited that there are several “So What Questions” (p. 73) that can be posed in order to illicit new interpretations to support the creation of new, situated knowledge:

Knowledge is produced in response to questions. And new knowledge results from the asking of questions. Once you have learned how to ask questions—relevant and appropriate and substantial questions—you have learned how to learn and no one can keep you from learning whatever you want or need to know. (p. 67)

The six questions I chose to explore in furthering the ongoing scholarly conversation are as follows: how does this theorizing align with, challenge, and extend the current literature; how does this theorizing relate to social constructionist principles; what aspects of this research may create concerns for my clients and other leadership development professionals; how has this theorizing already influenced my own practice; based on my own research experience, particularities of the study and suggestions for future researchers; and, finally, how does this research contribute to the field of leadership development?

How Does My Theorizing Align With, Challenge, and Extend the Current Literature?

It became obvious to me immediately upon returning to the literature that very few leadership scholars have tackled research that explored the practical development of leadership within organizations from a constructionist stance. Several scholars have written powerfully, from my perspective, about the possibilities that open up if we look at leadership as a dynamic, relational phenomenon that happens between and among people (Bushe, 2001; Drath, 2001; Gergen, 2009; Hosking, 2006; Vaill, 1998). The ideas are exciting, yet few researchers are examining, systematically, what happens when we apply the ideas.

The study I conducted was my attempt to observe, assess, record, and analyze the reported reality of participants who experienced a leadership development program. I am a practitioner, first and foremost, and I was deeply interested in what actually happened for members of an organization with whom we designed a program that invited participants to explore leadership relationally. The design and delivery of the program allowed participants from all levels of a large organization to come together and consider how leadership might emerge in their respective lives, professionally and personally, regardless of their formal education, title, or role. One of the underlying philosophical beliefs of the program under study is that leadership is everybody's business, leadership happens among people and is created in

relationships, and that leadership is not the sole responsibility of those at the top of the hierarchy.

This research initiative allowed me to study and analyze, in a systematic way, the influences that experience had on graduates of the program—from relatively recent graduates all the way back to graduates from the first program graduating cohort of 2003. Having access to research participants who graduated from the program many years previous was a privilege and the fact that so many of them were eager to participate in the research was a sign to me that the program’s influences lived on. This longitudinal aspect alone added a new twist to the current research, as so much leadership development research is based on participants’ program responses immediately upon leaving a program (Jackson & Parry, 2008).

My theorizing about the influences of the program presented at the end of Chapter Four suggests that the program experience was an organizational activity that invited participants to interact and to shape shared meanings about leadership. The creation of the safe space invited participants to build relationships with each other, communicate openly about their thoughts and feelings, and reflect on the patterns in which they played a role in constructing their personal and professional lives. As one interviewee stated, “What the program taught me is that if I am unhappy or frustrated, it is my job to figure out what to do differently because no fairy job mother is going to show up and save the day.”

Participating in the program invited participants to learn a new language with which they could continue their conversations about leadership and what it might mean in their daily lives, both inside and outside of the organization within which they all worked. The proposition that program participants played an active and integral role in shaping their organization, and that the organization also shaped them—no matter what role they played or what level of the hierarchy they represented—created a shift in what seemed possible. As Hosking and McNamee (2006) wrote, program participants became more aware that “we create—we perform *together*—a world, a lived reality” (p. 31).

The social constructionist and relational literature (Anderson et al., 2006; Gergen, 2009; Gergen & Gergen, 2004; Hosking & McNamee, 2006) intrigued me, yet seemed too theoretical to be easily applied. These research findings demonstrated that indeed the theoretical ideas can be applied and the application makes a positive difference. Research participants indicated that they listened more deeply, opened up to the differences among people, and

learned how to think carefully about how their actions and words contributed to situations and relations in which they played a part. One interviewee stated, “At risk of sounding like a suck up, I think this program basically helped me become a better person. Not a perfect person, mind you, just better.”

The research results aligned with Hosking and McNamee’s (2006) proposal that if we are open to exploring how we perform and coconstruct leadership and organizations,

we open ourselves up to listening, reading, talking, and writing in more “generous” modes—remaining open to the relational coherence of diverse ways of acting. We thereby avoid speaking with a sense of certainty that the world is or should be one way. And in so doing we open possibilities for the coordination of multiple ways of being human and of, as Wittgenstein (1953) says, “going on together.” (p. 31)

Gergen (2009) asked, “What does relational leading mean in terms of daily practice” (p. 334)? As a pragmatic leadership development practitioner, this question was of great interest to me, of course. From the moment I was introduced to social constructionist ideas and given the language with which to explore it, I was curious about what these theories might actually look like in the day-to-day world in which my clients perform. I think that this research study offers one answer to Gergen’s question.

If we agree that leadership is everybody’s business and design a program that embraces that perspective, leadership stands a much greater chance of flourishing among those involved. The research findings indicated that this particular Leadership Development Program did exactly that. An interviewee asked (and answered) this question: “What happens when I take the philosophy of this program home with me? All of a sudden my 3-year-old gets to take on more responsibility because she can practice leadership too.”

As I reflected further on my theorizing, two main aspects stood out as aligning significantly with current leadership literature. One was the central core category of the safe space created by the leadership development program, and the other was the way the program influenced both the participants’ professional and personal lives.

The leadership literature addresses the importance of creating healthy, trusting, respectful relationships in which people can show up comfortably as themselves—this is considered foundational to leadership emerging (Crane, 2002; Goldsmith, 2007; Kouzes & Posner, 2007; Rock, 2009). Trust and respect are two words that permeate the literature, and this research study indicated that it was the cocreation of a trusting, respectful program

environment that led to participants' experience of a safe space in which to develop.

It is impossible for people to bring their whole selves to work and to engage in creative, collaborative practices if they do not feel safe. Unless leadership development practitioners, in relationship with the organizational leaders who support the design and implementation of these initiatives, take the time to consider the importance of building trust and openness among all participants, it will be challenging to create deep change. Practicing leadership activities demands vulnerability and risk taking, and without a safe space neither is likely. One interviewee shared,

There were so many times during the program that I felt scared. So it feels weird to tell you that I felt safe and scared all at the same time. Both were important because I did things I never would have imagined myself doing.

The research results indicated that program graduates appreciated the opportunity to share an experience with others from within their organization that encouraged them to talk about professional and personal hopes, challenges, issues, and opportunities, and how they might move forward. I think that people working within organizations long for opportunities to connect with each other and talk about things that really matter to them. Goldsmith, Kaye, and Shelton (2010) suggested,

They are not sure that it is possible, or even if their longing is legitimate. Work is not generally thought of as a place where you are supposed to get your own needs met. Thus, people come to accept what they believe to be inevitable: that they must leave a part of themselves at home when they come to work. (p. 24)

The results of this research study indicated that it is indeed possible to create ways for people at work to connect in a meaningful manner. One interviewee suggested, "The people from this program know things about me that even some of my closest friends don't. We had some deep conversations. Important conversations."

Scholars who call for—and continue to write—prescriptive, clearly defined and formulaic findings that profess to guarantee leadership development success may be challenged by my findings. For researchers dedicated to discovering best practices or linear rules for developing leadership in organizations, my theorizing may appear too unstructured and not prescriptive enough. Susan Scott (2009) began *Fierce Leadership* by explaining that because her work as a coach has been so successful, her clients

encouraged her to present her recommendations for outstanding leadership in a book. Susan Scott (2009) responded: “Over and over I would tell them, ‘What you and I are talking about is so fundamental that if I wrote another book, it would have to be titled *The Complete Guide to the Fricking Obvious*’” (p. 4). I am not convinced there is anything fricking obvious about leadership or its development, despite Susan Scott’s (2009) assertion. Standing in front of the bookshelves at any major airport, however, it becomes apparent that many authors still aim to generalize and capitalize on our seemingly insatiable desire for positivist answers. Anyone wanting a simple solution for developing leadership within an organization may be challenged by my (likely unmarketable) theorizing.

I trust, however, that the story about the influences of one very specific leadership program, that unfolded in a very specific time, place, and organization, will have value for others. By reading this particular localized leadership development story, my hope is that others committed to growing their organization’s capacity to perform leadership collaboratively—and healthily and playfully—will be able to learn from it and adapt anything that seems useful to their own, differently located, situation. Harter’s (2008) advice to leadership researchers suggested,

Students must make explicit, and attempt to share, what they are doing and how they are doing it—to search for a “local” and tentative consensus, even if it might be possible to go off in a thousand different directions, because without that local and tentative consensus, there is no understanding and no hope. (p. 51)

The research participants supported the creation of a local and tentative consensus. The mind maps and final theorizing were affirmed several times throughout the grounded theory research process by graduates of the program with whom I shared my work, asked questions for greater clarity, listened carefully for responses, and waited for the “head nod” (Huffaker, 2009, p. 46). The head nod, according to Huffaker (2009), is that moment when one’s conversation partner begins nodding and smiling revealingly. “We’ve noticed something: people cannot help but give you a sign when they feel seen. Our highly technical name for it? The Head Nod. When you’re capturing people’s reality accurately, heads begin nodding around the room” (Huffaker, 2009, p. 49). I was lucky enough to engage with research participants who were patient enough to tell their stories, support me in making meaning of those stories, and then listen and offer feedback until the head nod was unanimous among us—what a feeling it was to realize that the research participants

nodded their heads in response to the theorizing because through it they felt as though they had been seen and heard.

The tentativeness of theorizing about leadership and its development is important because it “permits us to bracket certain doubts and alternatives for a limited duration and for limited purposes, without pretending they don’t exist” (Harter, 2008, p. 51). In leadership studies, there are so many divergent views that it is hard to decide which view might fit best or which theory serves our goals and objectives. Harter reminded leadership scholars that presenting one’s research findings to the academic community “requires extraordinary humility, because it reminds us that no matter how valid, true, or useful our current beliefs—even after long years of experience or study—we still do not possess the one encompassing view of leadership” (p. 78).

With humility, I suggest that the program under study made, and continues to make, a positive difference in the lives of many of its graduates. The difference the program is making has lasted for years as graduates have applied their learning. The research findings indicated that what this difference actually looks like in action covers a wide array of practices including, but not limited to staying curious longer, asking more reflexive questions, speaking up more often when uncomfortable, and learning how to invite a diversity of opinions when making a decision.

Anecdotally, several research participants shared stories that indicated that the Government of Alberta is indeed benefitting from the influences that the program is having on its graduates, especially in areas where a number of staff have all completed the program. One interviewee indicated that it is obvious within a few minutes of sitting in a meeting which attendees have completed the leadership program simply by the way they listen and ask questions. The question about organizational benefits, however, invites a completely different research initiative.

How Does This Theorizing Relate to Social Constructionist Principles?

I attempted, throughout this dissertation, to make my assumptions explicit—I set out mindfully and deliberately to conduct research about a specific leadership development program from a social constructionist and relational stance. The findings indicated to me that relational leadership emerges when people from any walk of life and from any level of an organization come together to talk about, experiment with, and practice making things better. This kind of leadership stands a much better chance of being created when, in dialogue, we explore how we might perform our

relationships, both at home and at work, in a way that is welcoming and inclusive rather than talking about leadership as something that only happens when the boss makes it happen. My theorizing, constructed from the data, suggests that it is possible to develop leadership activities at all levels of an organization.

I could fantasize about how exciting it would be to reveal some extraordinarily clever truth about leadership development in the hopes of becoming a world renowned guru, but I would eventually need to admit to myself that my clever truth was constructed, not discovered, and built on—and from—my own worldview (Drath, 2001). Even though some might find my constructed truth helpful or even valuable, others with a different worldview might not. Drath (2001) suggested that researchers committed to exploring the phenomenon “hold their own truths lightly, as it were, and appreciate the capacity of other worldviews to make up truths as well” (p. 144).

Holding my own truths lightly is, in large part, how relational principles supported me throughout this research initiative. I am aware that I brought my own worldview to this study, just as others have brought their respective worldviews to their leadership research. Possibilities for new futures within organizations will open up when those involved in leadership development activities practice welcoming the exploration of each other’s worldviews.

This research offers challenges to individualistic ideas and methodologies. I challenged traditional individualistic perspectives towards leadership, its development, and how to go about conducting the research itself. These more traditional approaches to conducting leadership research “are founded on the principles of separation of the researcher from the researched, and individuals from the organizational analysis” (Özbilgin, 2006, p. 245). The research participants and I made relational sense of the reality of the influences of the leadership development program under study. We did not discover reality or the truth—we created it through our conversations.

I intentionally chose to use everyday terms such as storytelling, conversation, and performance as this research study unfolded. I preferred these relatively informal terms and, as I edited the final version of this dissertation, I realized how often they appeared within the text. This dissertation is simply a story, a good story I hope, about how a leadership program influenced the performance of, and cocreation of, leadership by its participants.

Leadership and leadership development traditions have been stabilized, from my perspective, through repetition and beliefs about what is expected and proper. If one assumes, for example, that leadership only happens at the very senior levels of an organization due to the people who are formally designated as leaders, these research results might appear off base and beg the question: why bother studying leadership development at all levels of an organization when it is clear that leadership begins at the top? As one of the research participants wrote in an email accepting my invitation to be interviewed,

Doesn't it seem a bit crazy that you're asking an old admin lady about leadership? Nobody would believe it. But I am figuring out how I can help make a real difference around here. I guess that's doing leadership, isn't it?

If an organization's popular discourse professes leadership is everybody's business and recognizes and celebrates leadership that is cocreated by people at all levels of the hierarchy, then leadership can indeed be constructed at all levels. The community—or team, family, or organization—determines through its coordinated activities and conversations and shared stories, what the word leadership means and what leadership performance looks like. The research findings indicated that this kind of phenomenon is possible.

There are ways to shake up embedded conventions and traditions. I would suggest that this particular leadership development program was more like an improvisational actor or musician taking an idea off in a slightly new direction, rather than creating something brand new. The program design and delivery was close enough to established leadership development conventions to be perceived as a viable and credible possibility—the program was given a chance. Using the language of improvisation, this particular program played “yes, and . . .” with more conventional approaches to leadership development in order to build on what was already accepted by the community in which it was to be performed. This improvisational practice enhances the possibility of cocreating new futures within organizations because one of the beautiful things about this way of working is that as more and more people start to willingly engage in an initiative, “it will naturally spawn a series of mashed-up, hybridized ‘yes and’ –ed ideas that are simultaneously surprising and fitting. The fact that you don't know where it will end simply means that it's a great place to start” (Poynton, 2008, p. 247).

I believe that the program reflected many constructionist principles. As facilitators, we were devoted to the creation of a container in which our

participants could be vulnerable, ask questions, and be heard and seen as important, contributing organizational change makers. Anderson et al. (2006) agreed with the importance of creating environments that promote dynamic conversation:

It is in dialogue that we both solidify the known and create new meanings in the face of the unknown that yawns before us. It is through dialogue that we grow sensitive to multiple realities and learn to negotiate across diverse relationships and realities. (p. 12)

New possibilities for organizing open up when there are opportunities for organizational members to connect with each other in relationship, especially with people who represent a diversity of personal and professional life experiences. It is within these relationships that research participants began to stretch and grow their understanding of the complexity of various leadership ideas. The sustainability of the program ideas was evidenced by data that indicated many graduates continue to connect with each other to further their relationships and their learning. Anderson et al. (2006) agreed that in vibrant organizations, these conversations never end:

As understandings and desires pass away and new meanings take their place, so must conclusions and commitments be reformed. Sustaining vitality within an organization requires continuous conversation. (p. 13)

What Aspects of this Research May Create Concerns?

If this leadership development program influences participants the way the theorizing suggests, it invites organizational clients and leadership development practitioners to question for (and with) whom we should be designing leadership development initiatives. I surmise that this question might cause discomfort.

I think that especially for those who understand leadership to be solely the responsibility of those at the top of an organization's hierarchy, this research presents a challenge. If one is committed to the influence that individually conceived "great leaders" (Gergen, 2009, p. 332) can exert on organizational performance, it does not make sense to welcome people from all levels of the organization to participate in leadership development initiatives. It would make more sense to continue to invest leadership development resources in strengthening those at the top of the organizational hierarchy, those with positional power.

One of my deepest fears about this individualistic interpretation of leadership—that only those at the very senior levels of the organizational hierarchy are responsible for creating and maintaining leadership—is that those endowed with positional power will take advantage of people lower in the ranks. I am outraged when I witness what I consider to be a lack of respect or appreciation for members of an organization who perform a role considered by some as less than, or not as important as other roles. A common example in my experience is the way some administrative support or janitorial staff are treated. Approaching leadership development from a relational stance requires organizational members to acknowledge and honour that everyone is sharing the performance of leadership, together, and nobody is more important or more worthy of respect than anyone else. Fuller (2006) agreed and argued that “since most organizations are hierarchical and hierarchies are built around gradations of power, it comes as no surprise that they are breeding grounds for rank-based abuse” (p. 7).

I do not believe that we should stop providing leadership development for those at the top—those performing senior level positions within complex organizations will continue to deserve (and require) support. I believe, however, that given the challenges facing organizations today, it is simply not enough to expect leadership performances only from those at the top of the organizational. Leadership performances are possible up, down, and throughout organizations, especially if we are open to inviting the kinds of conversations that can help make that so. If we continue to construct—through our processes, leadership development initiatives, and conversations—organizations in which leadership can only be created by those few special leaders who hold senior level positions, we run the risk of locking into place Fuller’s (2006) rank-attributed problems and indignities. As a society, some of us put so much credence on a person’s organizational role and formal title, it dictates how important we perceive that other person to be.

Our individualistic notions of leadership have become outdated, in my opinion, no matter how tempting it is to believe that one extraordinary individual may, indeed, be able to save the day. For Lone Ranger fans, my theorizing may present a concern. If leadership is indeed everybody’s business and leadership performances happen relationally at all levels of organizations, then Lone Rangers (or those who perceive themselves to be Lone Rangers) might need to dismount their trusty steeds and step into open conversations with those on the ground, inviting others to contribute, share their perspectives, and perhaps even offer differing points of view. I think that these

conversations can feel intimidating and awkward, especially for those who believe that they are, individually, responsible for the creation of successful leadership. Open conversations about inviting leadership performances at all levels of an organization might feel like letting go of control to those who long to see themselves as a Lone Ranger-esque hero or heroine.

Letting go of control is challenging, especially for people who long to feel important, valuable, and right. This reminds me of my own tendency to be least aware of how full of myself I am when I am convinced that I am the sole keeper of the truth about a certain situation, believing that only my solution will allow us movement forward. If I may return to the Lone Ranger metaphor, it is in those moments when I most need to be invited to get off my own high horse in order to step into dialogue.

It is often the most successful people within organizations, and those seen by others as strong individual leaders, who will be most challenged by a relational interpretation of leadership development. The idea of a leadership development program open to anyone within an organization might seem—to those who see themselves as talented leaders—to be a waste of time and resources. Successful people often believe in their own skills and talents, and that belief influences their thinking they themselves have orchestrated and led the good things that have happened. Goldsmith (2007) offered his explanation of why successful people struggle to let go of their individualistic mindset:

Successful people believe that they have the capability within themselves to make desirable things happen. It's not quite like a carnival magic act where the mentalist moves objects on a table with his mind or bends steel. But it's close. Successful people literally believe that through sheer force of personality or talent or brainpower, they can steer a situation in their direction. (p. 20)

Other people also often believe that these extraordinary people are the real leaders, the movers and shakers who make things happen. It is easy for me to understand why leadership is often attributed to these seemingly special individuals in organizations, especially when these individuals are given promotions into formally designated leadership roles and are given positional authority and also rewarded financially for their exemplary performance. This is how, in my opinion, the notion of individually designated leaders helps create our relationship with the word power, and our way of talking within organizations about certain people having power over others. I appreciated Gergen's (2009) citing of Hannah Arendt's relational interpretation of power:

Power is never the property of an individual; it belongs to a group and remains in existence only so long as the group keeps together. When we say of somebody that he is “in power” we actually refer to his being empowered by a number of people to act in their name. The moment the group, from which the power originated to begin with . . . disappears, “his power” also vanishes. (p. 334)

As I reflected on those who might be challenged by the results of this research, I realized that anyone devoted to maintaining a sense of control and power over other people might resist the notion that a program in which all participants—no matter what role they play within the organization—can learn and practice performances of leadership.

If we talk about leadership as a relationally constructed phenomenon that can be collaboratively performed by anybody within an organization, we can imagine greater emphasis on collaboration, dialogue, empowerment of everyone involved, and on the development of healthy relationships and learning. Gone is the Lone Ranger approach to organizational superheroes who are tasked with creating leadership from the top of the hierarchy. If we are interested in creating different kinds of organizations in which to work and contribute, it needs to happen among everyone involved, through lively dialogue.

The leadership development program under study did put certain relational propositions to work. Depending on one’s paradigm and belief system about leadership, the research findings may delight, or disappoint. I was delighted by what I learned.

How Has this Research Influenced my Leadership Development Practice?

Near the beginning of my working relationship with my dissertation supervisor, Sally shared her interest in making research processes more accessible, more practical, and more closely related to the very real world in which each of us lives and works (S. St. George, personal communication, May 29, 2009). The intersection between my research and my practice offered rich opportunities to experiment and learn. What follows is an explanation of the developments within my own practice connecting directly to this research: a greater commitment to incorporating improvisational principles into facilitated sessions, the importance of creating a safe space in which clients can collaborate and perform their work together, and the experimental use of a meeting facilitation technology called Open Space (Owen, n.d.).

My interest in improvisation and theatre has been apparent throughout this dissertation report; I found, as the research unfolded, that I consciously used more improvisational exercises within my sessions with clients. This was not brand new to my work, yet through the research I realized why my intuitive preference for incorporating these interactive improvisational activities was so important, both for me and for my client groups. The performative nature of improvisation is a consistent reminder that we can perform and cocreate all sorts of different realities if we are open to experimenting with different acts and supplements (Gergen, 2009). One specific example of this is a commonly used improvisation exercise referred to as mirroring, during which participants move as though one is the mirror image of the other. It is possible to invite one participant to be the leader and the other the follower, switch roles as leader and follower, and to leave the exercise at that after inviting participants to reflect on which role felt the most comfortable for them. Adapting the activity, it is simple to add in a variation by suggesting that neither of them are leading or following and to keep moving together, as though the mirror still exists. Adding music is especially exciting because the moving pairs often take on a life of their own and it is clear, often only momentarily, when participants have let go of needing to lead or follow—they are physically cocreating. The conversations that follow such an exercise open up possibilities that leadership may in fact be performed without a designated leader and follower. I am consistently surprised by the connections that participants create between such simple improvisation exercises and their real world—giving people a lived experience in order to connect theory to practice has always been important to me, and this research experience affirmed how integral it is to the work I do and has encouraged me to do it more often.

The safe space created by the leadership development program under study became the core category—featured in the centre of the theorizing image (see Figure 6). I reflected on the choices we made as facilitators of the program and how the creation of a safe space actually comes into being so that clients can share dialogue and open conversations. I turned back to the literature and realized that a safe place is only possible by being sensitive to status. Paying attention to status might be the most important thing any of us can do to alter our relational performances in both our personal and professional lives.

Status within an improvisational context is a concept that has nothing to do with social ranking and is constantly changing and shifting during any sort of human interaction (Johnstone, 1983; Poynton, 2008). Status, as

improvisers understand it, is something that is created relationally through actions in the moment. Status has a fluid, dynamic quality and a person can embody high one instant and low the next by changing gestures, posture, tone of voice, and the way he or she listens to another person. High and low status are not good or bad, and the status dance between people is always there, always present, always influencing how the relationship is performed and how those involved experience the relationship. A common outcome of a person taking a high status position while relating with another— sometimes done consciously and often not—is the creation of a sense of strong confidence, often associated with knowledge, power, and authority. These are not inherently bad choices, yet in my experience, too many people spend too much time offering high status actions. Poynton (2008) observed that the “vast majority of business people feel the high-status position is intrinsically superior. Indeed, they often find it hard to see low status as anything but weak, and in competitive environments many people will habitually try to avoid it” (p. 202). Becoming comfortable with playing with low status positions is what creates empathy, connection, and a safe space for creating open dialogue and creative possibilities. Although relationships are fluid performances and it is important to be able to shift playfully from high to low status positions, organizational life, especially when the talk turns to leadership, often (in my experience) invites declarative, opinionated, behaviour focused on what should happen, what must happen, and what world leading experts recommend. How does one practice performing in a low status position? My simple response is to make choices that let the other person know that you value them and that you see them as important and special. Poynton (2008) agreed and offered this elegant response:

Allowing yourself to not know the answer, to be happy with ambiguity, to invite people in, to leave ideas unfinished so that others can contribute—these behaviors, which are increasingly important in a collaborative knowledge economy, all require you to become comfortable with low status . . . letting go of the idea that leaders must always be certain and commanding. (p. 214)

It was the importance of the leadership development program’s safe space that prompted me to pay even closer attention to the choices that I make in my day-to-day work to make low-status choices when appropriate. I now ask more focused questions about the history and context within which I am going to be working so that I think more carefully about how much time it will take to support the development of the vitally important safe space. I have become

more courageous in reminding clients that without the creation of a safe space, it is difficult to create change. I am clearer than ever that without the creation of a safe space leadership development does not stand much chance of happening, and noticing (and playing with) status relationships is what allows a safe space to emerge.

The third direct impact that this research initiative has had on my practice involves greater use of Open Space, a facilitation technology designed by Harrison Owen (n.d.). Owen created this approach to holding meetings and conferences based on feedback he had received over many years indicating that when people attend conferences and long meetings, their favourite and most productive aspects were consistently coffee breaks, lunches, and cocktail parties. It was during these unstructured moments of the conference that the dialogue was richest, the energy the highest, and participants reported that they were delighted to be able to talk about whatever they wanted to talk about, with whomever was most interested in similar topics or themes.

Despite having participated in Open Space many times, I was not using it often within my own practice until conducting this research project. It struck me so clearly, especially when faced with a client engagement that included over 100 people who had experienced deep conflict within their industry and struggled to communicate with each other, that Open Space was one approach to possibly creating the safe, open space necessary for collaboration. In a 3-year initiative with this particular client, we have begun using Open Space as a way of bringing diverse players within the industry together to talk about issues that really matter to all of them, despite their differences. The research findings, particularly the core category about the importance of taking the time to create a safe space for participants, prompted me to suggest using Open Space, a suggestion that seemed rather intimidating for both the client and for me, as the prospective facilitator. Upon describing Open Space methodology to my client, his response was, “It all sounds lovely but these people really can’t stand each other. Some of them won’t even speak” (Client, personal communication, August, 4, 2009). We still have one full year to go in working to create a more collaborative industry, so the hoped for results have not been fully realized at the time of writing. The response from the key stakeholders, however, has been surprise and excitement about what now seems possible.

Open Space is grounded by four guiding principles. The first principle reminds participants that whoever comes are the right people. The second principle of Open Space is that whatever happens is the only thing that could have happened. Participants are asked to be prepared to be surprised. The third

principle states that whenever a particular conversation starts is the right time because spirit and creativity do not run on the clock. This particular principle can be frustrating for people who prefer things to be meticulously organized and punctual. What often happened during our last Open Space meetings is that participants sank so deeply into conversations over coffee that they could not tear themselves away to go to one of the formally posted sessions. The final principle that guides Open Space is that when a session is over, it is over and participants are invited to move on in order to find another session that intrigues them. There is only one rule associated with Open Space, and it is referred to as the “Law of Two Feet” (Owen, n.d., para. 12). The idea behind the rule is as follows: participants have the right and the responsibility to use two feet to go wherever they need to in order to maximize learning and contributing. If one is not learning or contributing to a session, go someplace else so as not to waste time. In my experience of using Open Space more deliberately over the past 2 years, I realize that the “Law of Two Feet” (Owen, n.d., para. 12) is death to egotists and speechmakers. Participants who do not understand how to play low status and invite others to collaborate through transformative dialogue quickly find themselves all by themselves. This research project has inspired me to experiment and play with creative ways to create safe space, and Open Space has worked.

At the outset of this research journey, I was convinced that the project was different and quite separate from my real world role as a practitioner. I saw them as two individual aspects of my life and work, both important, yet somehow disconnected from each other because the performance of each role would ask different things of me. The research, I assumed, would be a huge stretch because my usual rhythm involves interacting with people, teaching, facilitating, speaking, and practicing—I saw the research as lonely and, perhaps, quiet and dull as compared to my real world work. Indeed, the research project was a stretch for me, and it took a full year more than what I had originally anticipated. What I realized in writing this chapter, however, is that the research findings and the process itself are intimately related to my role as practitioner. I began playing with my new learning immediately, experimenting and testing what was becoming clearer to me as the research unfolded. It has influenced how I speak with clients, how I design sessions, how I relate with fellow facilitators when we are collaborating in the creation of new programs, and it is allowing me to speak with more confidence about the important aspects of leadership development that have always seemed difficult for me to articulate.

Particularities of the Study and Suggestions for Future Researchers

The particularities of this study are many. Based on what I have learned through this research initiative, both about leadership development in the organization under study and about myself as researcher, I have several suggestions for future researchers.

Much has been written about the challenges of a researcher investigating, in depth, one particular person or relationship or organization. That is what I chose to do, and with that choice comes particularities. The Government of Alberta was kind enough to host this research and offer me access to all graduates of their leadership development program. This was an invaluable opportunity for me to learn more about the influences of the program going back over several graduating classes. It is only one program, within one organization, and it happened to be a large public service organization. One of the limitations of the study is the uniqueness of the context in which the research was conducted: a government organization, at a specific time, with a specific history and set of traditions, in a certain province within a certain country. This was a story about one program.

I am a facilitator within the program, so I had a vested interest in the research and a personal connection with the research participants. For me this was an added benefit because I was able to reconnect with graduates, fellow facilitators, and the program administrators to ask questions and learn from people that I already knew. This, of course, was also a limitation because the research participants may well have been biased towards me. Those who volunteered to participate knew me, many of them had a positive experience in the program, and they were eager to share their stories and perspectives. The disgruntled or disappointed participants did not contribute, so those voices remained unheard.

The data were collected and analyzed by less than 100 graduates of the program, only a small percentage of those who had graduated. This limited the diversity and variety of opinions we might have gathered if it were possible to include more research participants. What helped me feel comfortable with this obvious limitation was that any time I crossed paths with one of the graduates who did not participate in the research, I hastily pulled out my laptop, showed them the theorizing image, and asked for a response. Specifically, I asked how the image captured their understanding of the influences the program had on them, personally. What I have noticed over the past 4 months, is that consistently graduates have given me the head nod (Huffaker, 2009), and then have gone on to open up and share with me their story about the influences the

program had on them. The research has become a wonderful conversation starter, and despite its particularities I think that it accurately portrays my story, grounded in data, about the differences the program is helping create. Somebody else might have asked the exact same question and ended up telling a different story. I am comfortable with that notion.

My suggestions for future research and researchers will be presented in two sections. First I want to capture the questions that are alive in me, after answering my own research question. Next, I will share lessons learned as a researcher in the hope that they will support others who are excited about beginning their own research journeys.

I am curious about the creation of open, safe spaces, and I would like to understand more clearly how different people, within different organizations, go about creating, nurturing, and maintaining those safe spaces, especially within a hierarchy. If it is as important as research participants indicated, then my guess is that safe space is just as important within teams, divisions, and entire organizations. With colleagues at The Banff Centre, we have begun playing with ideas of how to go about creating that safe space, and how to support others to do the same. Using the language of the theatre, we call the relational way of being that results from safe space “ensemble” (I. Prinsloo, personal communication, January 7, 2011). Building on our experience in the theatre, we are realizing that only when ensemble has been created can participants step into skilful rehearsal, and only with skilful rehearsal can participants perform adaptively. Responses from our first group of Banff participants indicated that they fully acknowledge the importance of creating ensemble, but they struggle to figure out how to do it, especially within organizational environments that have a history of unsafe space. What the creation of safe space looks like in practice, within organizations is worthy of exploration. Safe space also requires maintenance, consistent attention, and energy from all involved, and I am interested in what that looks like in practice.

The big question that seems unanswerable to me is whether or not leadership development programs actually influence the performance of the organizations that continue to invest heavily in such initiatives. Did participants who felt positively influenced by the program actually contribute more to their organization’s successful delivery of services? This is the question that many are interested in, and few have attempted to answer. There are many variables involved in organizations performing successfully, and it seems difficult to attribute better performance to something as isolated as one

leadership development program. With patience and persistence, however, researchers may be able to tackle a systemized approach to studying the differences in organizational performance that result from intentional leadership development initiatives.

One of the important factors that impacted the influences of the program was the relationship the participant had with his or her immediate supervisor. In analyzing the data, there were several instances when research participants talked about the difference it made whether or not their supervisor invited conversations with them about the program, what they were learning, what they wanted to practice, and how the supervisor might support them in exploring their leadership performance. The scope of this research project did not allow for further investigation of this seemingly important influencer, and I think it is an intriguing area of inquiry. One of my clients has introduced a new leadership development program over the past year and has added what she considers to be an important introductory piece. Before beginning the program, each of the participants' direct supervisors is invited to attend an introduction to the program, an overview of its design and learning objectives, and hear how they as supervisors are expected to support and nurture their direct report's leadership learning journey (D. Comfort, personal communication, September 1, 2010). This is a step forward, and it expands our understanding of the complex variables that deserve our attention if we are devoted to growing leadership performances within our organizations. A program alone cannot work leadership magic.

I learned plenty about myself as a researcher and some of the lessons learned are difficult to share because I have made up the story that I should have known all of this before embarking on this research journey. I find it interesting to notice that it took quite a while for me to admit to myself that I felt rather lost. My perception was that other doctoral students were not as lost, and it was not until I starting speaking about my confusion that I realized I was not alone.

It is important to surround yourself with other students, whether that happens in person, by telephone, or virtually in an online environment. Having a safe space in which to ask questions, encourage each other, and to celebrate small victories along the way was very important to me. My fellow Taos Institute students founded and participated in an active online community, and I often logged into the ongoing conversations when I felt frustrated and alone.

I worked with two different writing coaches as the dissertation unfolded and it was only 2 years into the research journey that I admitted to

myself that I needed focused and intentional coaching support. The irony that I work as a professional coach is not lost on me, and it took two different coaches to help me realize a good fit. Especially as a working professional, it was important that my coach supported me, challenged me, and was there to celebrate when I accomplished something that, in all seriousness, few people would care much about. Coaching reminded me that I was making progress, albeit slow, and that juggling dissertation writing with a full-time practice is a challenge.

I learned that the research participants cared deeply about the research and that they were eager for updates and an understanding of what I was learning, where I was at in the process, and when they would eventually get to contribute and read the final outcomes. This surprised me and delighted me, and it reminded me that the research was my story about other people's stories. Participants invested time and energy sharing their perspectives and they were counting on me to deliver. It was their commitment to the process that kept me going at times when I was ready to give up.

I learned that it is important to experiment with a variety of techniques, no matter how silly they may seem to others, to support oneself to write—to do the work. One of those techniques that turned out to be incredibly helpful to me is a free software program called Pomodoro® (Mill Square Software, 2010), originally designed in the 1980s by then-university student, Francesco Cirillo (n.d.). In playing with ideas around my own time management—and lack thereof—I stumbled across Cirillo's story. He struggled to organize himself to write in a focused manner and started using his mother's kitchen timer, which happened to be in the shape of a red, ripe tomato. He discovered, through experimentation, that the optimum amount of time to work in a focused way was 25 minutes, followed by a short (5 minute) break. He also discovered that the ticking sound of the timer, along with the loud ring at the end, was conducive to disciplined attention on a task that needed doing. The free software version of Pomodoro® (Mill Square Software, 2010) was easily available, and I used it faithfully—from the moment I discovered it to the final draft of this dissertation. I realized that I needed structured support and the ticking tomato worked. Procrastination on important tasks was not new to me, and I know that Cirillo's tomato will become a permanent support to me.

Last but not least, I learned the importance of a healthy, robust relationship with my dissertation supervisor. I cannot emphasize enough how carefully one should choose that supervisory partner. The most important aspect of our relationship, from my perspective, was Sally's insistence that I

design and conduct the research in a manner that felt natural for me, in a rhythm and tempo that aligned with my life and work. Having my supervisor in Calgary, where I live and work, was an added bonus, and it was very helpful to have access to insight, feedback, and support in person over the 3 years of the dissertation project. The importance of investing in the cocreation of this vital relationship cannot be overstated.

Looking back on the process has been an intriguing one because there were so many times along the way when it seemed impossible to imagine that the project would ever actually be done. I learned valuable lessons about my own belief system, about myself as a researcher, and about my relationship with leadership development. What has become crystal clear is the importance of examining the influence that my work has on others, for that has helped create a sense of calm and greater confidence in the choices I make within my practice and within my personal life.

How Does this Research Contribute to the Field of Leadership Development?

Sinclair (2007) argued, “Scholars have preferred individual-centric explanations for success, and have often acted as if there are universal rules for leadership that can be distilled and applied regardless of context” (p. 23). There are no rules, yet for this research to have significance it is important to make explicit how it contributes to both the field of leadership development and the evaluation of leadership development initiatives. Sinclair wrote, “The idea that leadership can be created with the right template has been animated by a research methodology which I describe as ‘track down the truth about leadership and train in it’” (p. 23). Instead of tracking down the truth or offering a prescriptive template for creating effective leadership within organizations, I offer three important ideas for improving leadership development practice that are grounded in this research.

First, exploring the phenomenon of leadership is a deeply personal process and must honour the stories and histories of every single person involved. Leadership development participants arrive in a program with experience, wisdom, and their own perspectives about how leadership is being performed in their own lives, and in the life of their organization. The safe space that is to be created, so central in my theorizing, is brought into being by the sharing and valuing of the diverse stories of the participants. Nurturing and maintaining safe conversation spaces for participants to show up fully is integral to forming a foundation for leadership learning.

Second, for the curriculum of a leadership development program to resonate and make sense for participants, there needs to be time and space provided during which participants can apply and experiment with the ideas in the context of their real world, both professional and personal. Without opportunities to perform the leadership learning and take notice of the difference the performance makes—or does not make—it is difficult for participants to expand their understanding of what the theories and ideas might mean within their own relationships. The training room experiences had value according to research participants, but it was not until their learning collided with their real challenges that their understanding of leadership shifted and expanded.

Third, when evaluating leadership development initiatives, it is beneficial to approach the evaluation and assessment process as an opportunity for not only the evaluator(s) to learn and grow, but for the participants themselves to learn and grow as they reflect on their experiences. I believe that this research project would have taken on a very different look and feel if the underlying intention was to discover what is good and bad about this particular program, or to determine whether or not the Government of Alberta was getting their money's worth from their investment in the program. The practice of leadership program evaluation can be performed in a variety of ways. When the intention of the evaluator is to continue growing leadership capacity among those who choose to participate in the process, there are benefits that exceed the analyzed data and conclusions—stories and learning are shared, relationships are strengthened, and collective understanding of how leadership might be performed more effectively is enhanced. The evaluation process itself becomes another form of leadership development.

My hope through this research initiative was to create theoretical insights that might inform practical possibilities for leadership development within organizations. Viewing leadership as a relational performance, creating a safe space in which participants can reflect on and experiment with new ways of performing in their day-to-day lives, and evaluating the learning experience with the intention of benefitting the participants and their organization are practical possibilities—not rules, and certainly not a template—but possibilities for improving the performance of leadership within organizations.

How Do I Conclude?

David Mamet (2000) wrote that the play is done “when the hidden is revealed and we are made whole, for we remember—we remember when the world was upset” (p. 79). As I think back to the beginning of this research endeavour, I wondered how I was going to tell the story with academic rigour and my own personal touch. Those thoughts and feelings accompanied me through much of the journey. At the end of a play, according to Mamet, when we have exhausted all possible avenues of investigation “when we were without recourse or resource (or so it seemed), when we were all but powerless, all was made whole. It was made whole when the truth came out” (p. 80).

I find it fascinating that Mamet (2000) put emphasis on the idea of truth coming out at the end of a good play. From my social constructionist stance, it prompts a grin to think about concluding this dissertation with any proclamation of a truth. As Sheila McNamee reminded us in our Taos Institute (n.d.b) qualitative inquiry seminar, researching from a social constructionist stance invites us to ask ourselves whether this research is useful, versus whether this research is true (S. McNamee, personal communication, May 29, 2009). What truth might I possibly share?

As I reflected on Mamet’s (2000) explanation of what happens at the end of a good play, however, I opened up to the possibility that his perspective might still guide the ending of this dissertation:

At that point, then, in the well-wrought play (and perhaps in the honestly examined life), we will understand that what seemed accidental was essential, we will perceive the pattern wrought by our character, we will be free to sigh or mourn. And then we can go home. (p. 80)

In conclusion, I will examine as honestly as I can the patterns wrought by my character through this research adventure, along with elements of the story that I think were indeed essential—so that we can sigh or mourn, and hopefully smile, and then go home.

Patterns Wrought by my Character – My Multi-Being Relational Self

When Ken Gergen (2009) wrote about multi-being, he explained the irony of sitting by himself writing:

As I sit here writing this book, I am filled with doubts and turmoil. I am acutely aware that for every sentence I write, another voice is

smirking. At each moment I am confronted with dozens of ways of putting things, and dozens of criteria for judging. It is a major effort to suppress the nattering, but I am in peril if I do not. (p. 134)

Why is this exploration of multi-being and my relational self important? As I reflected on Mamet's (2000) suggestion that the end of this particular story is a chance for me to reflect on the patterns wrought by my character, I needed to acknowledge the multi-being nature of my character.

It is with others I have played out the essential patterns that created this project and these outcomes. Mitchell (cited by Gergen, 2009) proposed that "when we feel most private, most deeply 'into' ourselves, we are in some other sense most deeply connected with others through whom we have learned to become a self" (p. 136).

For my Mom in particular, this doctoral research was an important project, and she helped create in me the tenacity to keep at it, even when I was exhausted and ready to give up. The number of times my Mom asked over the past 3 years, "So, how is that dissertation coming along" (E. R. Dawson, personal communication, May 12, 2011), are too many to count. Wanting to delight and make my parents proud is an important part of my learned self.

My experiences within the applied improvisation community have greatly influenced my thinking about the performative nature of relationships and leadership. Poynton's (2008) aptly titled book *Everything's an Offer* became a touchstone for me, and the offer that sparked this research initiative was a simple question asked by a stranger on a flight: If you were going to do a PhD, what would you want to learn? Everything is, indeed, an offer.

My introduction to the faculty and associates of the Taos Institute (n.d.b) have altered who I am in deeply satisfying ways. I am aware of the difference it has made to play with my new found social constructionist language. Gergen and Gergen (2004) suggested that "if scientific writing speaks only to scientists, then those outside the science cannot enter the dialogue. The sciences become exclusionary" (p. 76). Gergen and Gergen's words encouraged me to conduct research and to write in a way that feels comfortable for me, and in a way that will hopefully feel comfortable for my participants and those interested in this research. I wanted to invite and include people, rather than exclude.

The participants of the Leadership Development Program, my fellow facilitators, and the program administrators have helped me mature as a facilitator. In many ways, I feel as though I owe my professional career to these people who have given me the opportunity to experiment, learn, and to

practice. In talking about ourselves as a leadership development community, the word family is often used. In my experience, these kinds of relationships are rare in professional circles, and I will always consider myself privileged to have participated in the program. Throughout this research initiative, research participants and program stakeholders have consistently inquired into my progress, my learning, and my story. The part of me that did not see myself as a researcher was brought into being through these relationships with interested colleagues.

It is important for me to share the pattern of conversations that unfolded between my partner and me as this research unfolded. Grounded in a more positivist perspective from which to conduct research, Bob challenged me to stand my ground and find the language and the ideas with which to explain why this research was so important to me. As our relationship grew and deepened, so did my relationship with the research itself; because of Bob's differing points of view, always challenging and always supportive, I was invited to step into saying what I was noticing, what I was thinking, how I was making sense of the data, and how I was going to tell my story. This creative tension, not always comfortable, became an energy source for what I consider to be my best work. It was this relational performance of open, rich dialogue that demonstrated to me that I had a story worthy of sharing, and the stamina to tell the story in a way that made sense for me and the participants of the research. It was after all, our story. Our truth.

The End

Social science research is a creative act that helps “produce realities” (Law, 2004, p. 143). Research processes interact and relate with all sorts of realities already being enacted and “it re-works and re-bundles these and as it does so re-crafts realities and creates new versions of the world . . . enactments and the realities that they produce do not automatically stay in place. Instead they are made, and remade” (p. 143).

As I write this, leadership development initiatives will be in the process of being made and remade in many organizations. That is as it should be. My hope is that this particular research story may support others in making and remaking leadership.

When it comes to leadership development in organizations, we need to acknowledge that “this stuff isn't rocket science; we all just need to learn together” (Palus & Horth, 2002, p. 201). My hope is that we find ways to

welcome others into conversations about leadership and its development in order to learn from and with them about possible ways forward.

Jackson and Parry (2008) concluded their book submitting that “at the end of the day we judge the quality of a leadership theory by the quality of the questions it creates in our minds rather than the quality of the answers that it gives” (p. 123). As I complete the writing of this dissertation there are many questions alive in me—questions that provide me with energy and hope. Most of my friends, family and colleagues devote at least 40 hours per week performing some role within an organization. My questions revolve around the kinds of experiences and conversations we might design within those organizations to help cocreate vibrant, productive, life-giving relationships that get the job done and strengthen people in the process. What if leadership is everyone’s responsibility and the way to make things better is to collaboratively perform what it is we want to create? “What if. . .” questions are not questions to be answered, they are possibilities to explore.

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Appendix A: Invitation to Participate

Hello, Leadership Program Graduate:

One of the leadership program facilitators, Karen Dawson, is conducting her PhD research about leadership development. The final outcome of the research will be a published book that contributes to the literature about organizational leadership development.

Karen is interested in hearing from you about the influences this program has had on your professional and personal life, and on your leadership journey. Participation is completely voluntary, completely confidential – and there are various ways of participating.

The first opportunity to participate is on Wednesday, September 23rd at 4:45 pm in Edmonton.

Karen invites you to a group session to share your experiences and perspectives on the influence this program had, or continues to have, on you.

You will have a chance to connect with other program participants and mentors, hear each others' stories about how leadership is unfolding, and support Karen in figuring out what the themes are. There will be plenty of snacks, conversations, and a chance to help analyze and make meaning of our collective leadership stories.

What if you live outside of the Edmonton area?

Karen very much wants to hear from participants and mentors all over the province, and is excited about hosting group sessions in Red Deer, Calgary, Lethbridge (anywhere really!) if you are interested. When it is time for one-on-one interviews, Karen wants to use the most energy and cost efficient ways of hearing from you so there will be a chance to communicate using phone, Skype, or whatever medium works best. Send Karen an email at [email address] if you live outside of Edmonton and would like to be involved as a research participant or if you would be interested in hosting a group session.

All program graduates and mentors are invited to contribute their leadership experiences, no matter how long ago you participated in the program. Karen has created a website that explains the details and she looks forward to re-connecting with you.

If you are interested in participating and contributing (and she hopes that you are!) here is the link to Karen's Research Website for more information and further details: <http://karendawson.yolasite.com/>

Appendix B: Interview Matrix Consent

This study is being conducted by Karen Dawson. My credentials with the Taos Institute/Tilburg University can be established by emailing my academic supervisor Dr. Sally St. George at [email address].

I hope to learn what difference this program has made, and continues to make, to you and to your relationships, professionally and personally. I guarantee confidentiality.

The purpose of this session is to share your leadership experiences, and support the research process by analyzing and making meaning of the data. There will be no video or audio recording of the session (without your permission) and you will have the opportunity to review all gathered data before leaving the session.

****I may ask one small group's permission to video tape their process so that I can reflect on what happened and learn how to improve my facilitation, in order to enhance the rest of the study. If I ask you, you are most welcome to say, "NO!"*

This session will last approximately 90 minutes and you are free to leave the session at any time – this is a voluntary activity.

Any information that is obtained in connection with this study and that can be identified with you will remain confidential and will be disclosed only with your permission. Your name will not appear on any documentation.

You are making a decision whether or not to participate in a facilitated dialogue session. This decision will have no impact on your employment or advancement with the Government of Alberta – your participation is confidential unless you choose to tell others who are not in attendance at the session.

Your signature indicates that you have read the information provided above and have decided to participate. You may withdraw at any time without penalty should you choose to discontinue participation in this study. Should you decide to withdraw, your individual data may only be used with your permission.

Signature of Participant

Date

Age: _____

Ministry: _____

Years of Service with GoA: _____

Permission to Video Tape Your Process? (please answer YES or NO) _____

Appendix C: Flip Charts from Interview Matrix Session #1 in Edmonton

Question #1

When you think back to being in the program, what do you remember as highlights? What stories about the program do you tell most often?

- Exploring opportunity – “inventing opportunity”
- Diversity of group – appreciating differences
- Dialogue on what is leadership – especially in GoA
- Program gives common basis (for?) progressing
- Keeping leadership alive
- Commitments and expectations
- Connecting to others
- Engaged, supportive group
- Relationship of decisions outside work group or even department
- Deep change
- Group gave courage to act as a group
- Continued learning
- Useful tools – learnings
- Respect for people
- “Safe” area
- Confidence
- Mentor valuable

Question #2

What influence has the leadership development program had (or continues to have) on you?

- Better understand role – leadership & follower
- Understand coach vs. mentor
- See the big picture – all elements to consider
- Intentional application of model
- Develop “buy in” atmosphere
- How to look out for yourself
- Bonus – meeting people
- Engage people in “leadership”
- Create dialogue
- Model to engage people/tool
- Springboard
- Create passion for leadership
- Patience – better listeners
- Must continue to use – trust the process
- Crossed cultural behaviour
- Think of framework as guide
- Accountable
- Grew into themselves
- Confidence increased
- Happy
- Dialogue
- Shared terminology
- Recognize limits – things they were good at and need improvement

Question #3

How is leadership showing up for you in day-to-day life, professionally and personally?

PROFESSIONAL

- Job advancement
- Confidence
- Recognition
- Voice/heard and said
- Focus
- Communication: better listener, asked better questions, knowledge to share
- The feeling of being a better person
- Better able to lead outside the workspace
- Made connection with more people
- Have shared the tools learned from course and passed on to others
- Say what you mean, mean what you say

PERSONAL

- Easier to make decisions
- Better communication with children (18 – 32 years)
- Listening to hear and know what is the issue(s)
- Patience
- Leave title at the door in community environments
- Less family conflict by having family participate in discussion
- Increased language
- More comfortable physically, emotionally, and mentally
- Positive contribution from everyone
- Have pursued other career path in following the leadership model

Question #4

What difference has the program made in the way you engage in conversations, and in your relationships?

- Active listening
- Framework – engrained
- Confidence – language, people
- Better listening – more focus
- Taking action – applied it, accountability
- Involving others in decision making
- Courage and language to express self
- Values
- Respect ways people speak and communicate
- Reflection of self – more self awareness
- Language bridges the gap between the different perspectives
- More ready to embrace change
- Ask more questions and re-phrasing
- Program gave the language to bring others on board – facilitative leadership

Appendix D: Reworked Interview Questions

- When you think back to being in the program, what do you remember as highlights? What stories about the program do you tell most often?
- What influence has the leadership development program had (or does it continue to have) on you?
- What expectations did you have as you registered for the program?
- What aspects of the program were challenging for you and what difference did that make?

Appendix E: Mind Map – Opened One Level

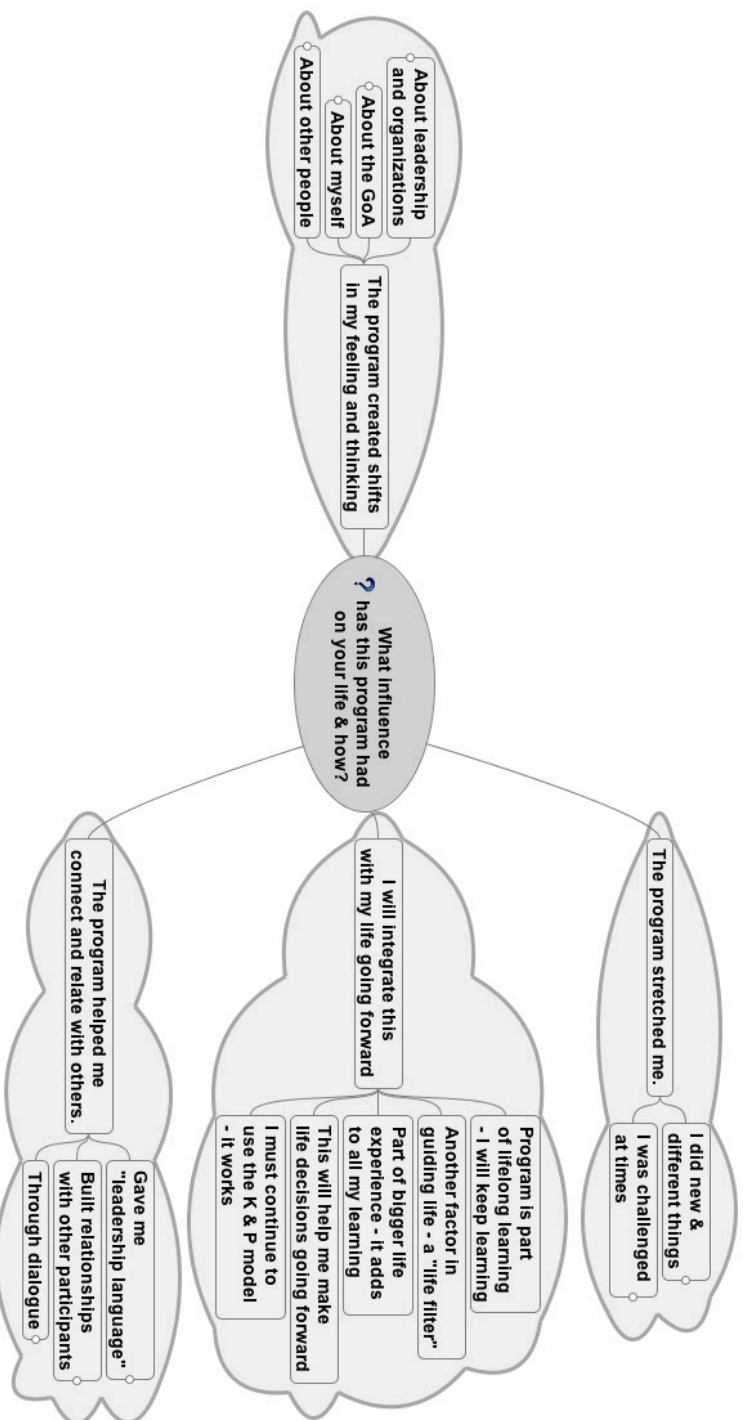


Figure E1. The first mind map opened one level from the most basic version.

185



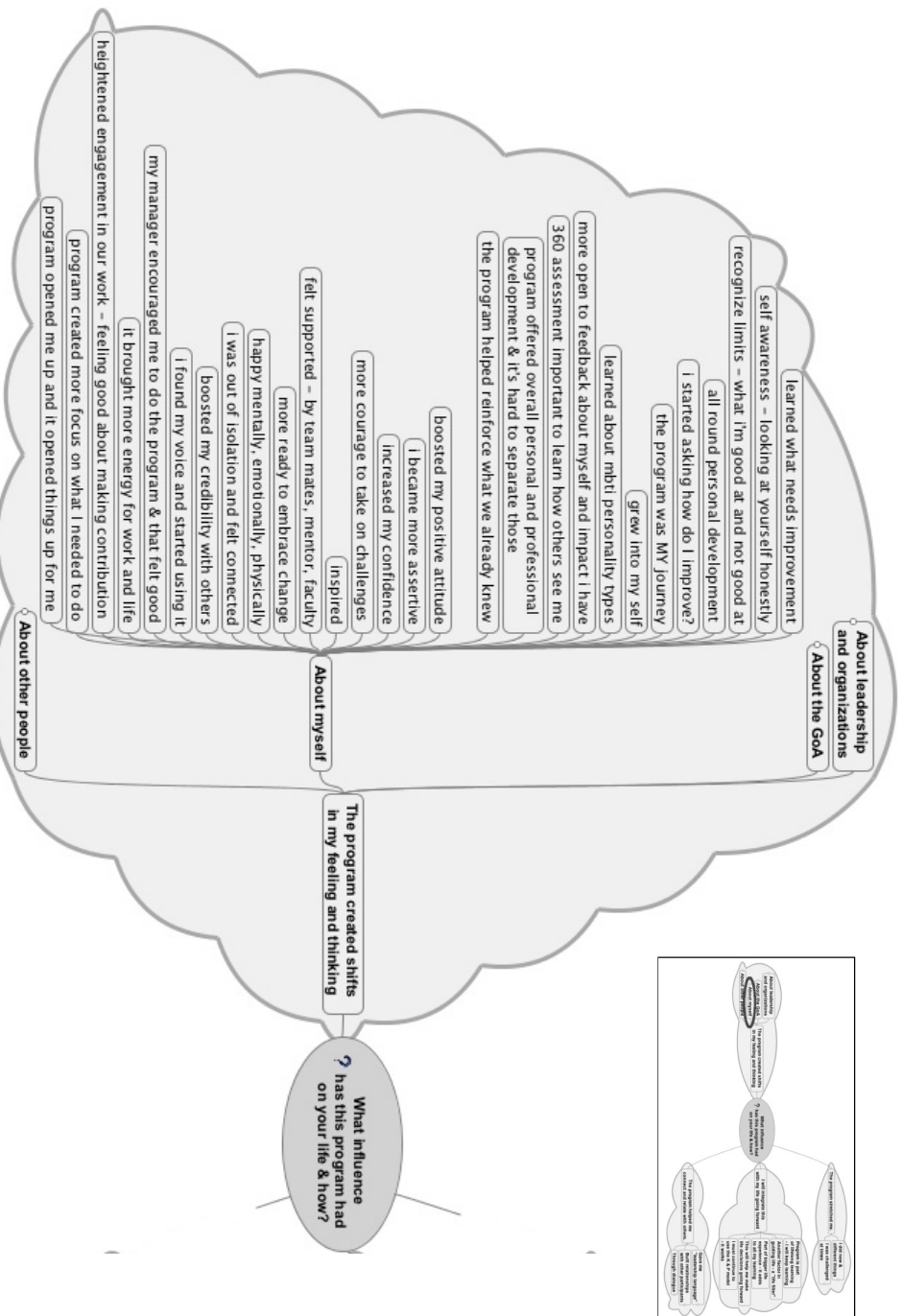


Figure F2. Left side – first mind map with ‘About myself’ expanded.

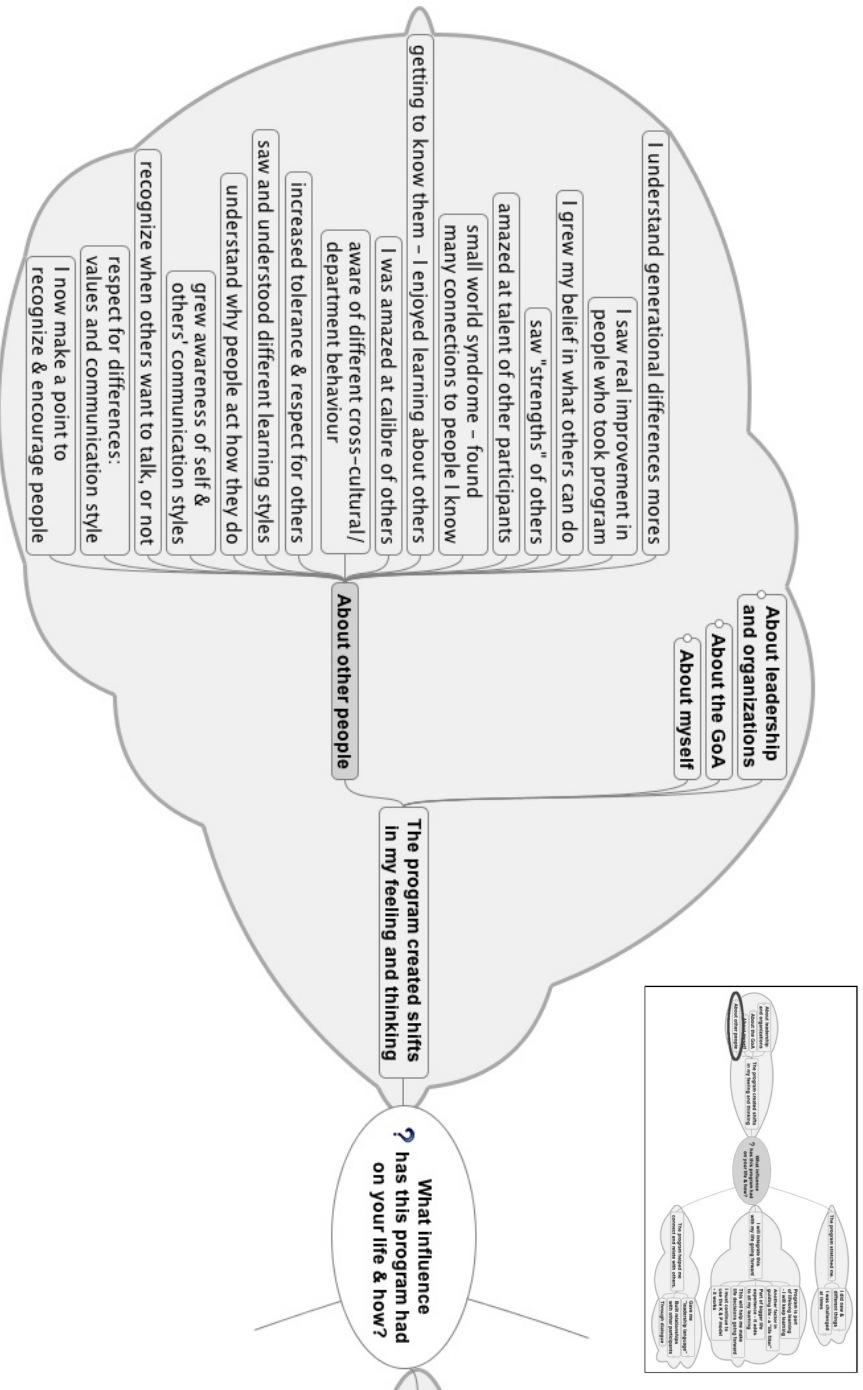


Figure F3. Left side – first mind map with “About other people” expanded.

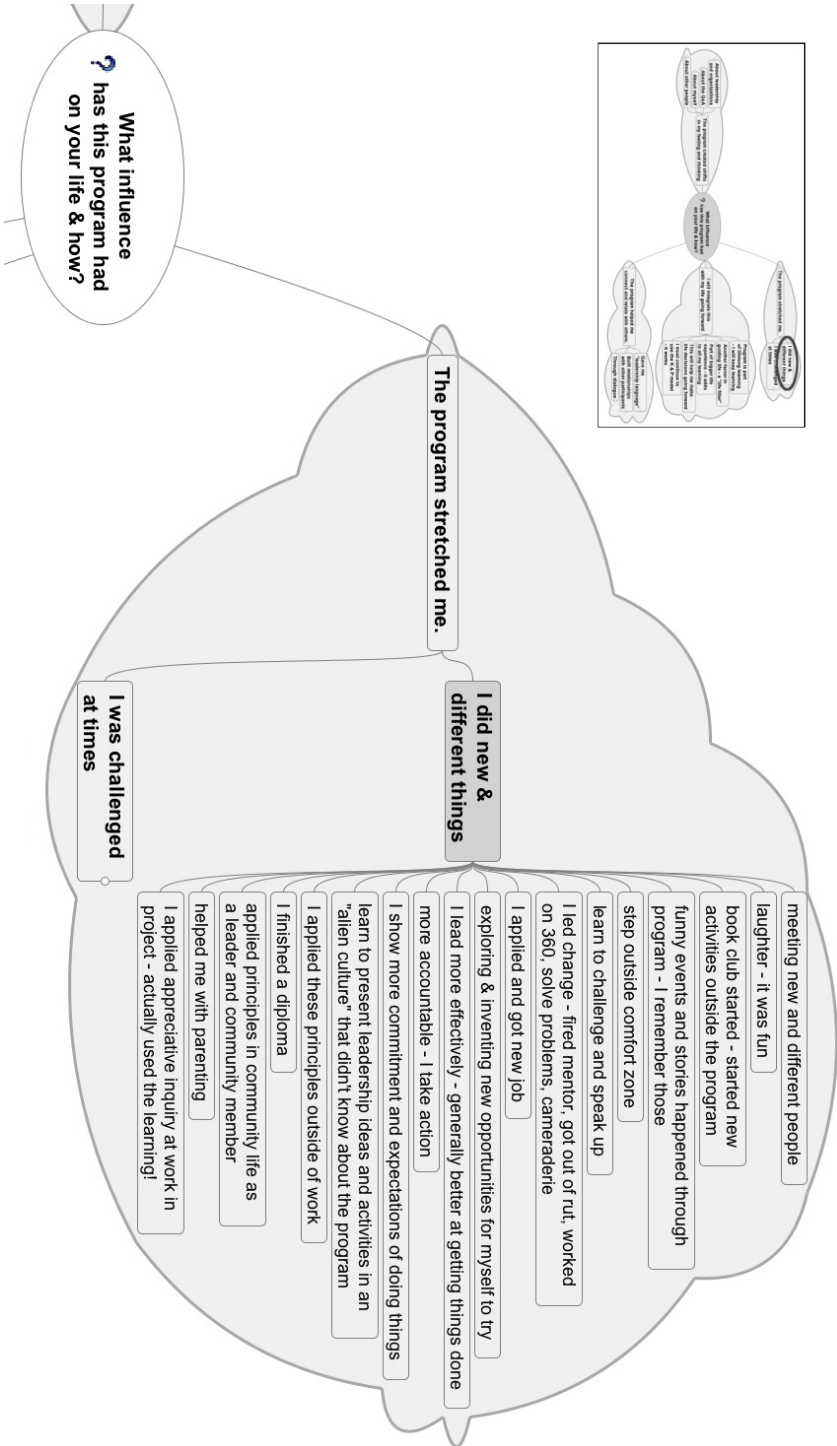
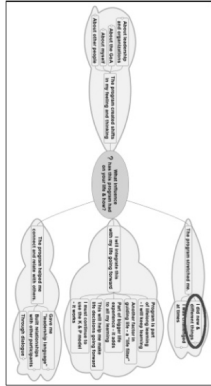


Figure F4. Right side – first mind map, top portion, with “I did new & different things” expanded.

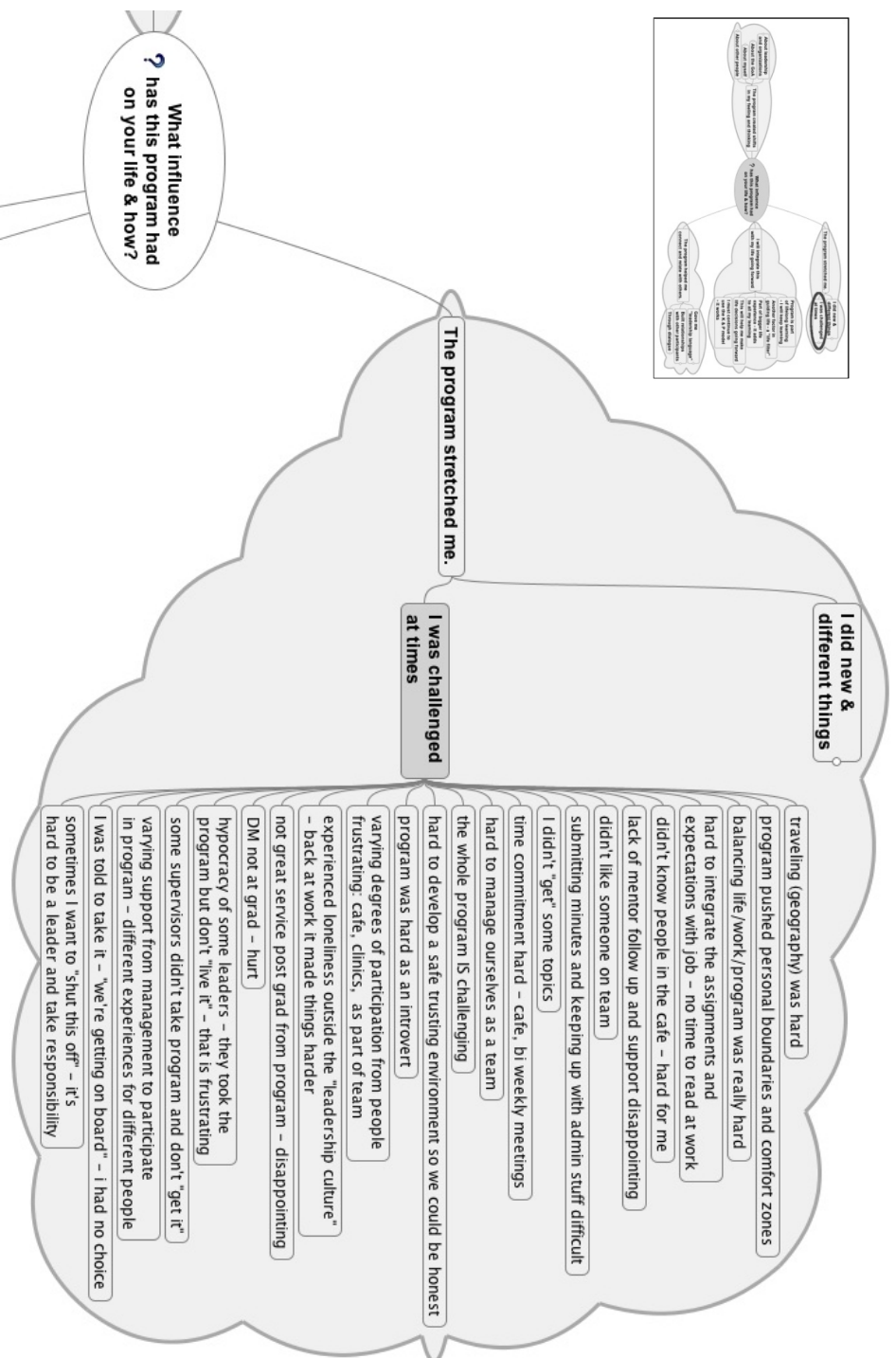
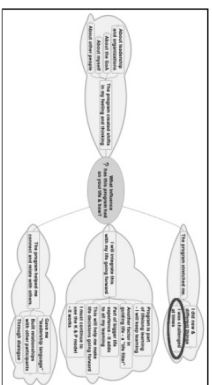


Figure F5. Right side – first mind map, top portion, with “I was challenged at times” expanded.

Appendix G: One-on-One Interview Invitation

Greetings~

If it still suits your August 13th day plan, I'd love the privilege of interviewing you about your experience in the leadership development program. I've attached a PDF version of the "mind map" that captures all of the responses I've heard to this point. It is rather like a skeleton and I am hoping that by interviewing a number of graduates, I will be able to put some "flesh on the skeleton" (so to speak) and also discover what might be missing or how you see things differently.

To summarize what you will see when you open up the mind map (and I know the font is very small on the screen so you may need to enlarge it) I've captured the main themes below.

The main, overarching research question is: **What influence has this program had (or does it continue to have) on your professional and personal life?**

The program stretched me

- I did new and different things
- I was challenged at times

I will integrate this learning with my life going forward

The program helped me connect and relate with others

- Gave me "leadership language"
- Built relationships with other participants
- Through dialogue

The program created shifts in my feeling and thinking

- About leadership and organizations
- About the Government of Alberta
- About myself
- About other people

I will bring a copy of the mind map (a big one!) to the interview and I'll be asking you the following questions in response to the map:

1. How accurately does this mind map reflect your experience of the program?
2. What would you add?
3. How do you see things differently?
4. Who might disagree with this interpretation of the program's influences – and what might they say?
5. How has your perspective about the program shifted, since graduation?
6. Tell me one story that illustrates the difference this program has made in your life.

If you are not available for the interview just let me know. If you are still up for spending 30 to 45 minutes together on August 13th, please confirm that with me. Big thanks. ~k

Appendix H: One-on-One Interview Questions

1. How accurately does this mind map reflect your experience of the program?
2. What would you add?
3. How do you see things differently?
4. Who might disagree with this interpretation of the program's influences—and what might they say?
5. How has your perspective about the program shifted, since graduation?
6. Tell me one story that illustrates the difference this program has made to you.

Appendix I: Participant Consent Form

You are invited to participate in a study that aims to explore the influence that *Leadership: From the File Room to the Board Room* has on participants and mentors.

I, Karen Dawson, am conducting the study and my credentials with the Taos Institute/Tilburg University can be established by emailing my academic supervisor Dr. Sally St. George at [email address].

I hope to learn what influence this program has had, and continues to have, on you and your life, professionally and personally. I guarantee confidentiality.

The purpose of the interview is to share your leadership program experiences, and support the research process by helping me make meaning of the data collected to this point. There will be an audio recording of the session (with your permission) and you will have the opportunity to confirm with me before ending the interview that you feel comfortable with what has been recorded.

Any information that is obtained in connection with this study and that can be identified with you will remain confidential and will be disclosed only with your permission. Your name will not appear on any documentation.

If you have any questions or concerns about participating, please do not hesitate to contact me by email at [email address] or by phone at [phone number].

You are making a decision whether or not to participate in an interview. This decision will have no impact on your employment or advancement with the Government of Alberta – your participation is confidential unless you choose to tell others about being interviewed.

Your signature indicates that you have read the information provided above and have decided to participate. You may withdraw at any time without penalty should you choose to discontinue participation in this study. Should you decide to withdraw, your individual data may only be used with your permission.

Signature of Participant: _____

Date: _____

Age: _____

Ministry: _____

Years of Service with GoA: _____